

DOCUMENT RESUME

ED 126 157

95

TM 005 427

AUTHOR Milczarek, Gary J.; And Others
TITLE Field Test and Outcome Milestone Report for Preparing Educational Training Consultants: Consulting (PETC-II).
INSTITUTION Northwest Regional Educational Lab., Portland, Oreg.
SPONS AGENCY National Inst. of Education (DHEW), Washington, D.C. Basic Skills Group. Learning Div.
PUB DATE Feb 76
CONTRACT NE-C-00-3-0072
NOTE 305p.; For the summary, see TM 005 428; For a related document, see TM 005 429

EDRS PRICE MF-\$0.83 HC-\$16.73 Plus Postage.
DESCRIPTORS *Consultants; Educational Objectives; Educational Programs; Evaluation Methods; Instructional Materials; *Instructional Systems; Interprofessional Relationship; Participant Satisfaction; *Professional Continuing Education; Program Effectiveness; *Program Evaluation; *Summative Evaluation; Trainers; Training Techniques; Workshops
IDENTIFIERS Improving Teaching Competencies Program; *Preparing Educational Training Consultants II

ABSTRACT

Preparing Educational Training Consultants (PETC) is a series of three cumulative and sequential instructional systems currently being developed by the Improving Teaching Competencies Program (ITCP) of the Northwest Regional Educational Laboratory (NWREL). This paper presents the results of an evaluation of the second instructional system in the PETC series, PETC-II: Consulting. This report includes four chapters. In the first, the PETC-II instructional system is described including its rationale, goals and objectives, training materials, procedures and target populations. The second chapter summarizes the field test evaluation methodology. The evaluation rationale and methods of obtaining information are explained for the five independent evaluation activities conducted in the field test and outcome milestone periods. The third chapter consists of a synthesis of the results of the five evaluation activities. Finally, the last chapter gives the conclusions of field test and outcome milestone evaluations. Appendix A includes a detailed description of the methodology and results of the five field test evaluation activities. Appendix B presents the developmental history of PETC-II in conjunction with a description of the general stages of product development in the Improving Teaching Competencies Program. Appendix C lists cognitive and performance objectives for PETC-II and Appendix D contains copies of evaluation instruments. A copy of the installation guidelines and registration material is provided in Appendix E. (Author/DEP)

EVALUATION

IMPROVING TEACHING COMPETENCIES PROGRAM

Technical Report Document 1, January
1990

FIELD TEST AND OUTCOME
MILESTONE REPORT FOR
PREPARING EDUCATIONAL
TRAINING CONSULTANTS:
CONSULTING (PETC-II)

Improving Teaching Competencies Program

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February 1976

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February 1976

Published by the Northwest Regional Educational Laboratory, a private nonprofit corporation. The work upon which this publication is based was performed pursuant to Contract NE-C-00-3-0072, with the Basic Skills Group/Learning Division of the National Institute of Education. It does not, however, necessarily reflect the views of that agency.

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CONTENTS

DIAGRAMS AND TABLES	v
PREFACE	vii
ACKNOWLEDGMENTS	ix
INTRODUCTION	1
Purpose of the Evaluation	1
Audiences For the Evaluation	2
Report Format	3
DESCRIPTION OF THE INSTRUCTIONAL SYSTEM	5
Description of the <i>PETC</i> Series	5
Description of <i>PETC-II</i>	8
EVALUATION METHOD	17
Evaluation Model and Rationale	17
Field Test Evaluation Activities	18
A Note on Testing	23
EVALUATION RESULTS	25
Need for Justification	25
Rationale, Goals and Objectives	28
Training Content	30
Instructional Procedures	32
Training Effectiveness	35
Workshop Satisfaction	40
CONCLUSIONS	43
Need or Justification	43
Rationale, Goals and Objectives	44
Training Content	44
Instructional Procedures	45
Training Effectiveness	45
Participant Satisfaction	47
REFERENCES	49
APPENDICES	51
Appendix A: Methodology and Results of the Evaluation Studies	51

Appendix B: Development History of <i>PETC-II</i>	219
Appendix C: Cognitive and Performance Objectives of <i>PETC-II</i>	229
Appendix D: Evaluation Instruments	235
Appendix E: Installation Guidelines and Registration Materials	311

DIAGRAMS AND TABLES

DIAGRAMS

Diagram I:	The Pyramid of Process Trainership	7
Diagram II:	Competencies of Process Trainers	8
Diagram III:	Relationships Among the <i>PETC</i> Systems	9
Diagram IV:	Phases of Consulting Relationship	12
Diagram V:	Differential Diagnostic Matrix	13
Diagram VI:	Differential Intervention Matrix	14

TABLES

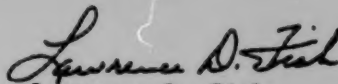
Table 1: Evaluation Information Requirements	19
Table 2: Field Test Evaluation Instruments	20

PREFACE

This publication is one of a series of technical evaluation reports issued by the Northwest Regional Educational Laboratory to document evaluation findings for selected products. The subject of this report is *Preparing Educational Training Consultants, Consulting (PETC-II)*, an instructional system developed in the Improving Teaching Competencies Program.

This technical report presents the methods and results of the field test and outcome milestone evaluations.

The report has been reviewed by staff members of the Improving Teaching Competencies Program Evaluation Coordination Unit. Also, an institutional technical review has been conducted by Laboratory specialists external to the Program.



Lawrence D. Fish
Executive Director

ACKNOWLEDGMENTS

This technical report reflects the contributions of many persons besides the authors. We would like to acknowledge with appreciation their efforts.

The participants in the training during the field test cooperated with our data collection efforts and in many cases extended themselves to facilitate the completion of the work.

Bill Ward and Marilyn Rieff, Office of Field Relations of the Improving Teaching Competencies Program acquired and set up the field test sites. Their efforts in establishing candid and effective field relations significantly eased the efforts of this evaluation task.

The senior trainers and installers at each of the field test sites ably assisted us while completely conducting the workshops. Their insights enriched our understanding of the system. They were Bob McGlone, Dean Gaudette, Jack Martin, Jim Forneris and Bill Symons.

Various drafts of this monograph were rendered more readable and comprehensive through the patient suggestions of Saralie Northam.

The very careful coding, data reduction and data analysis efforts of David Green are appreciated. David also managed the data collection of the alternatives search and one of the test sites.

Technical evaluation assistance was provided by Steve Murray and Bob Silverman.

Mike Northam ably provided the computer programming and data processing assistance we needed.

The able manuscript typing and the competent typing of initial drafts by Juanita Holloway and Dorothy Erpelding is most gratefully recognized.

Assistance in interviewing past *PETC-II* participants by Linda Ensign, Lou Thompson and Robert Morris is appreciated.

Finally, the encouragement and support of the developers, Ruth Emory, René Pino and Chic Jung are warmly remembered. Chic also provided the discussion comparing *PETC* with other instructional systems.

INTRODUCTION

Preparing Educational Training Consultants (PETC) is a series of three cumulative and sequential instructional systems currently being developed by the Improving Teaching Competencies Program (ITCP) of the Northwest Regional Educational Laboratory (NWREL). This paper presents the results of an evaluation of the second instructional system in the PETC series, *PETC-II: Consulting*.

PURPOSE OF THE EVALUATION

The management plan for the Improving Teaching Competencies Program divides the work flow for the development of an instructional system into five stages: planning, pilot, interim, field test and outcome. Each stage of development has an accompanying evaluation with a somewhat different design because of the nature of the information needed at the various phases. This document presents the results of evaluation activities for the *PETC-II* instructional system during the field test and outcome stages. The primary purpose of this evaluation is to provide summative information concerning the value and effectiveness of the instructional system thereby meeting a reporting requirement of the National Institute of Education (NIE).

The information obtained consists of (a) the judgments of people involved in the training (installers, trainers, participants and clients) concerning the efficacy of *PETC-II* under field conditions, (b) descriptive information about the kind of consulting done by *PETC-II* graduates and its effect on their clients, (c) expert judgment on the merit of the workshop rationale, goals, content and procedures, (d) descriptive

information about alternatives to *PETC* for obtaining consulting training, and (e) potential user perceptions of the need for *PETC*-related training in education.

AUDIENCES FOR THE EVALUATION

In planning and conducting the evaluation herein reported, several potential audiences have been kept in mind. The primary audience consists of all persons who may use the system in some way. These people appear to divide naturally into three interest groups, dependent upon the kinds of information they require. First, those in school districts and/or universities who plan and implement preservice or inservice education programs need valid and reliable information to choose among educational alternatives. Such information includes the cost of delivering the system, the anticipated effects of the training and the comparison of costs and outcomes to alternative approaches.

Second, since the *PETC-II* system was developed for use in workshop settings and thus requires a trainer to coordinate its activities, potential trainers need to know about the quality of the instructional materials, the adequacy of the procedures and the ways participants react to various suggested strategies. They also need to know about possible difficulties they might have in conducting a workshop based on the system.

Finally, those who will be participating in workshops need to know the type of experiences they can anticipate and how these experiences might lead to personal or professional growth. Such information will help them decide whether time spent learning to train group process skills might better be used for some other purpose.

Two other audiences exist: Northwest Regional Educational Laboratory personnel and members of the National Institute of Education (NIE). Those

involved in the development of the system can use the information for possible revisions or extensions. Members of NIE need information for monitoring the progress and assessing the quality of products from the Improving Teaching Competencies Program.

To insure that the information obtained through the activities planned does address the needs of the evaluation audiences named above, a fairly intensive review process was conducted in the interim milestone stage of development to ascertain the evaluation needs of NIE, potential product users and experts in process consulting in order for them to determine whether *PETC-II* is a viable system. Evaluation activities have been developed that address these needs as far as possible, given the state of the evaluation art and the evaluation resources of the Program.

REPORT FORMAT

This report has been prepared to be useful to a variety of audiences with differing needs for the kind of information wanted and the level of detail in which it is provided. A large amount of highly specific information was obtained through five, somewhat independent activities. The results presented in the report are an integrated summary of this information and are organized around six general evaluation concerns: (a) need or justification for the training system, (b) rationale, goals and objectives, (c) training content, (d) instructional procedures, (e) training effectiveness and (f) participant satisfaction. For readers who need additional information, a detailed description of the methodology and results of each of the five evaluation activities has been appended to the report.

This report includes four chapters. In the first, the *PETC-II* instructional system is described including its rationale, goals and objectives, training materials, procedures and target populations. The second chapter summarizes the field test evaluation methodology. The evaluation rationale and methods of obtaining information are explained for the five independent evaluation activities conducted in the field test and outcome milestone periods. The third chapter consists of a synthesis of the results of the five evaluation activities. Finally, the last chapter gives the conclusions of field test and outcome milestone evaluations.

Appendix A includes a detailed description of the methodology and results of the five field test evaluation activities. Appendix B presents the developmental history of *PETC-II* in conjunction with a description of the general stages of product development in the Improving Teaching Competencies Program. Appendix C lists cognitive and performance objectives for *PETC-II* and Appendix D contains copies of evaluation instruments. A copy of the installation guidelines and registration material is provided in Appendix E.

DESCRIPTION OF THE INSTRUCTIONAL SYSTEM

This chapter presents a general description of the *PETC* series and a more detailed description of the *PETC-II* instructional system which is the focus of this evaluation report.

DESCRIPTION OF THE *PETC* SERIES

One of the basic goals of the Improving Teaching Competencies Program is to develop instructional systems in process training to improve the organizational effectiveness of educational organizations. The approach toward reaching this goal is to provide educators with practical knowledge and skills drawn from the literature and research of human relations, group dynamics, organizational development and planned change. The following twofold strategy is used:

1. Provide preservice and inservice training programs for all educators in the knowledge, skills and values of basic group processes such as: (a) interpersonal communication, (b) problem solving and (c) interpersonal influence
2. Train a small proportion of educators to be able to provide the following help: training in group process skills (*PETC-I*), consulting in a temporary relationship (*PETC-II*) and long-term organizational consulting (*PETC-III*)

The first strategy is expected to provide individuals and intact groups with particular group process knowledge, skills and values. The second strategy is expected to provide support for the implementation of the training systems in schools. Whether the process knowledge, skills and values can be used effectively in schools and whether they will lead to improved organizational functioning depends, in part, on the degree of existing support for such knowledge, skills and values in the larger organizational context of the school.

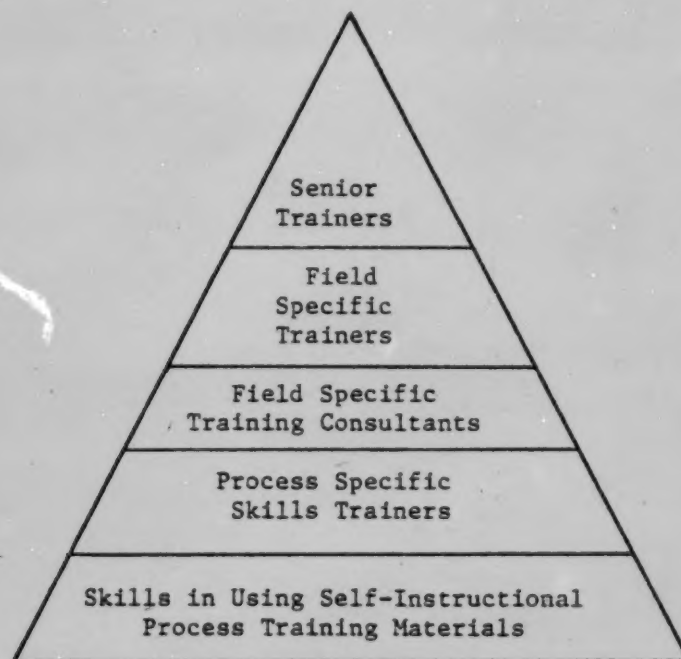
The *PETC* materials are based on the rationale that educators with these process abilities can help schools continue to grow in organizational effectiveness by facilitating development of a climate supporting application of the process skills. It is expected that those educators trained in these systems will use their abilities to help others increase their competencies in carrying out their educational programs. Thus, although only a small portion of educators will be trained in the *PETC* systems, the developers intend that these persons will improve the functional capabilities of groups and organizations. They will influence the ways administrators, teachers, students and parents in the educational community set goals, clarify communication, reach out to use relevant resources, systematically solve problems and make decisions, assess progress toward goals and cope with interdependence and conflict.

For those concerned with increasing the availability of process learning, the developers proposed that levels of trainership be conceived as a hierarchical pyramid. Those at the top know and can do more than those at the bottom. As one moves up in the hierarchy, both breadth and depth of trainer competencies increase. By employing this pyramid relationship of trainers, an organization can expand limited training resources. Whereas ten years ago, one needed a costly expert for even simple process learning experiences, the pyramid distribution of trainership levels and relationships makes simpler levels feasible for less skilled trainers. This breaks a long standing bottleneck in process training. This breakthrough has become possible through being explicit about the processes and trainer competencies and by the creation of support materials. Pressures for this breakthrough have come both from positive need for process learning and from the negative backlash of experiences created by inadequately prepared trainers.

The five levels of process trainership are presented as a pyramid in Diagram I. In Diagram II, a second inverted triangle is shown to represent the things that a trainer at each level knows and can do. The *PETC* series falls into the category of Field Specific Training Consultants. Other NWREL instructional systems, such as *Interpersonal Communications (IPC)* and *Research Utilizing Problem Solving (RUPS)* belong to the category of Process Specific Skills Trainers.

Diagram I

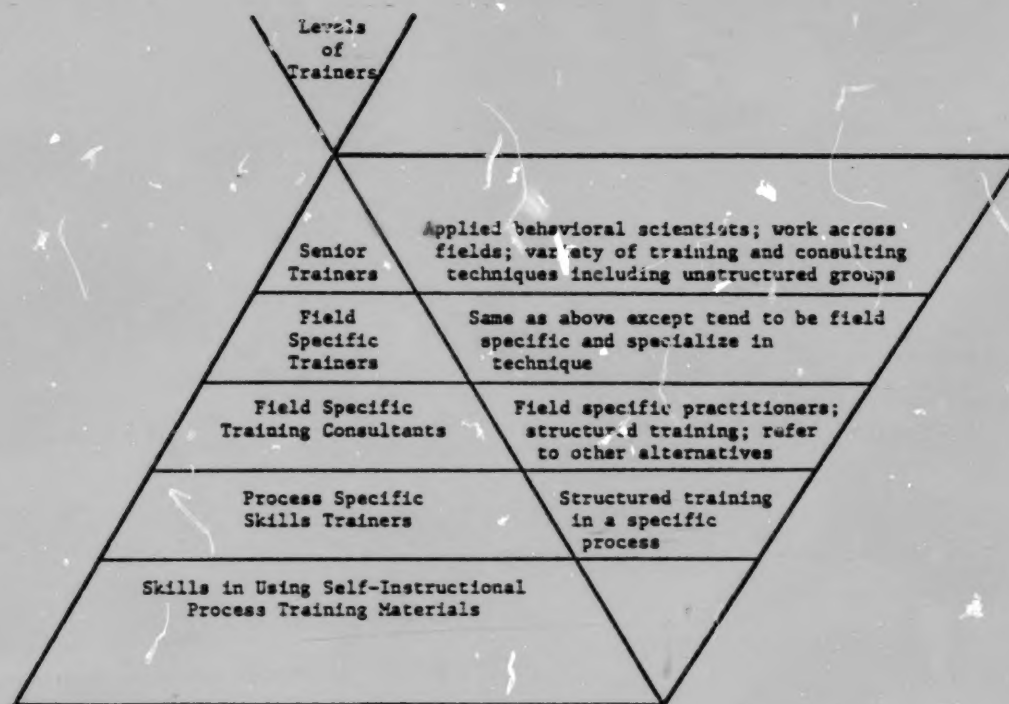
The Pyramid of Process Trainership^a



^aR. Pino and R. Emory. *Preparing Educational Training Consultants (PETC-I), Skills Training*. Portland, Oregon: Northwest Regional Educational Laboratory. 1972. p. 131.

Diagram II

Competencies of Process Trainers^a



^aR. Pino and R. Emory. *Preparing Educational Training Consultants (PETC-I), Skills Training*. Portland, Oregon: Northwest Regional Educational Laboratory. 1972. p. 131.

DESCRIPTION OF PETC-II

PETC-II is the second in a series of three cumulative and sequential instructional systems designed to help a cadre of educators acquire process training and consulting skills. The intended relationships among the PETC-I, PETC-II and PETC-III systems are shown in Diagram III. The PETC-II graduate should be capable of forming a temporary relationship with a small group or major subsystem of an educational organization to help it make progress toward its goals. The consultant helps by

Diagram III

Relationships Among the PETC Systems

<i>Factors Involving the Client</i>	<i>PETC-I (Skills Training)</i>	<i>PETC-II (Consulting)</i>	<i>PETC-III (Organizational Development)</i>
<i>Usual client system</i>	Small group	Small group or major subsystem of the organization	The organization (although most of the work may be with a major subsystem)
<i>Assistance for the client</i>	To increase process skills such as goal setting, communicating, influencing or decision making	To help the group obtain a goal by supplementing weak functions such as planning or validating	To add and maintain improved functional capability of the organization
<i>Usual duration of client relationship</i>	A few hours or days	A few days or weeks	A few months or 2 or 3 years

diagnosing the client's problems and providing assistance that will temporarily add or strengthen such functions as managing, planning and producing which allow the group to more adequately accomplish its immediate goals.

Goals and Objectives of PETC-II

The general goal of the PETC-II instructional system is to prepare educational training consultants who can temporarily help educators work more effectively in groups, i.e., committees, task forces and faculties. Therefore, the objectives of the system can be stated for both trainees and consulting client groups. These objectives are presented in greater detail in Appendix C.

Training Objectives for Participants

The following objectives are expected to be accomplished by the training strategies:

1. Increase trainee consulting skills (building helping relationships with client groups, diagnosing client needs and problems and developing and implementing plans for helping clients solve their problems)
2. Increase trainee understanding of key concepts in the consulting process (planned change, symptoms and causes of poor group functioning and procedures for helping groups become more effective)
3. Increase trainee appreciation for crucial consulting issues
4. Increase trainee awareness of their own values and motives for being consultants

Outcome Objectives for Clients. It is expected that prospective client groups for *PETC-II* consultants will have a problem or difficulty that is hindering attainment of their goals or purposes. The consultant is expected to help the client solve the problem in order to facilitate progress toward the client's goals. At the same time, the consultant is expected to help the client become more effective in some jointly selected group processes. Thus, as a result of consultation, a client group is expected to show:

1. Greater understanding of the problem or difficulty
2. Greater understanding of how to solve the problem
3. Greater commitment to implement action steps
4. Greater problem resolution
5. More efficient problem resolution
6. Greater clarity about goals
7. Greater consensus about goals when appropriate

8. Greater commitment to goals
9. More realistic goals
10. Greater progress toward goal accomplishment
11. Increased effectiveness in some group processes
such as: improved use of group resources,
improved problem solving skills and more
dispersed influence patterns

Description of PETC-II Materials and Strategies

PETC-II materials consist of a set of trainee materials (a trainee manual), a set of instructional strategies (a trainer's manual) and a set of orientation papers which introduce the system and outline procedures for installing or starting up a PETC-II workshop. The trainee materials include theory papers, diagnostic instruments and instructions for doing learning activities. The instructional strategies consist of a set of the trainee materials interspersed with detailed directions for conducting the eleven training sessions of a PETC-II workshop.

A PETC-II workshop is divided into three parts, the first consisting of three consecutive 10-hour days of instruction in basic concepts of consulting. A typical workshop consists of from 12 to 18 trainees and 2 trainers. Trainees are introduced to a variety of conceptual models and schema related to planned change. These include models developed by Lewin (1951) and Lippitt (1958) on the phases of the consulting relationship presented in Diagram IV. In addition, comprehensive diagnostic and intervention models developed especially for this instructional system are presented in Diagrams V and VI, pages 13 and 14. The differential diagnostic matrix (DDM) provides a model for differentially diagnosing the organizational functions and characteristics of client systems at different levels. The differential intervention matrix (DIM) provides a model for selecting and designing intervention strategies involving a variety of consultant roles.

Diagram IV

Phases of Consulting Relationship

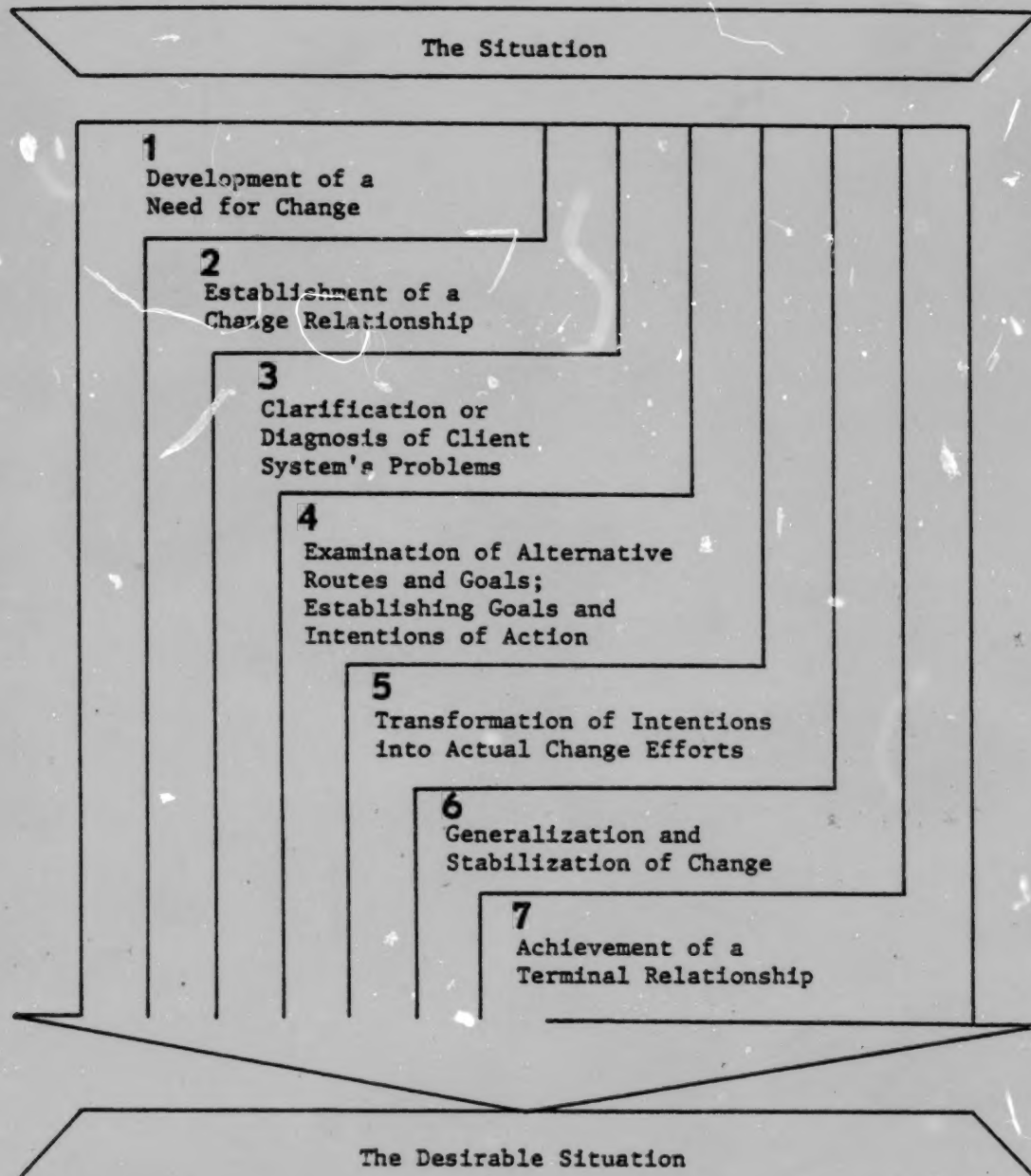


Diagram V

Differential Diagnostic Matrix

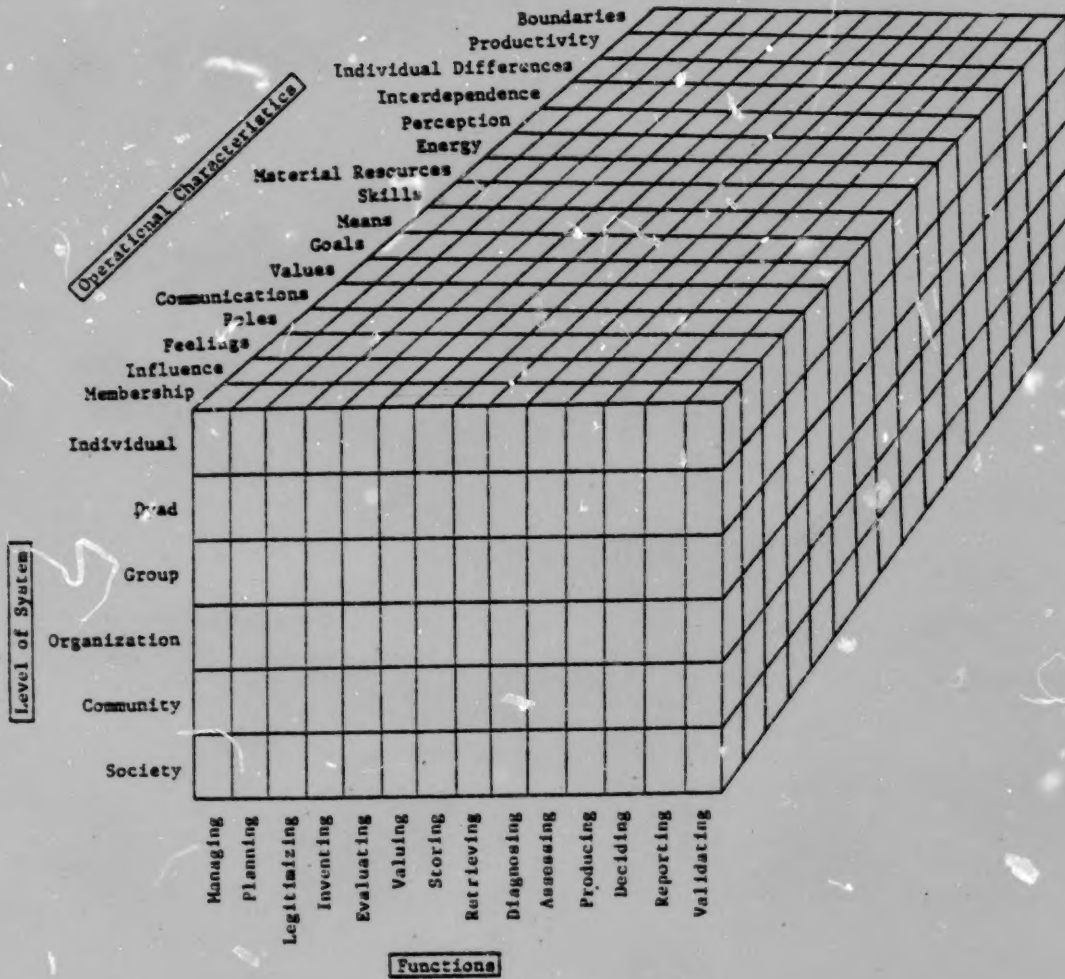
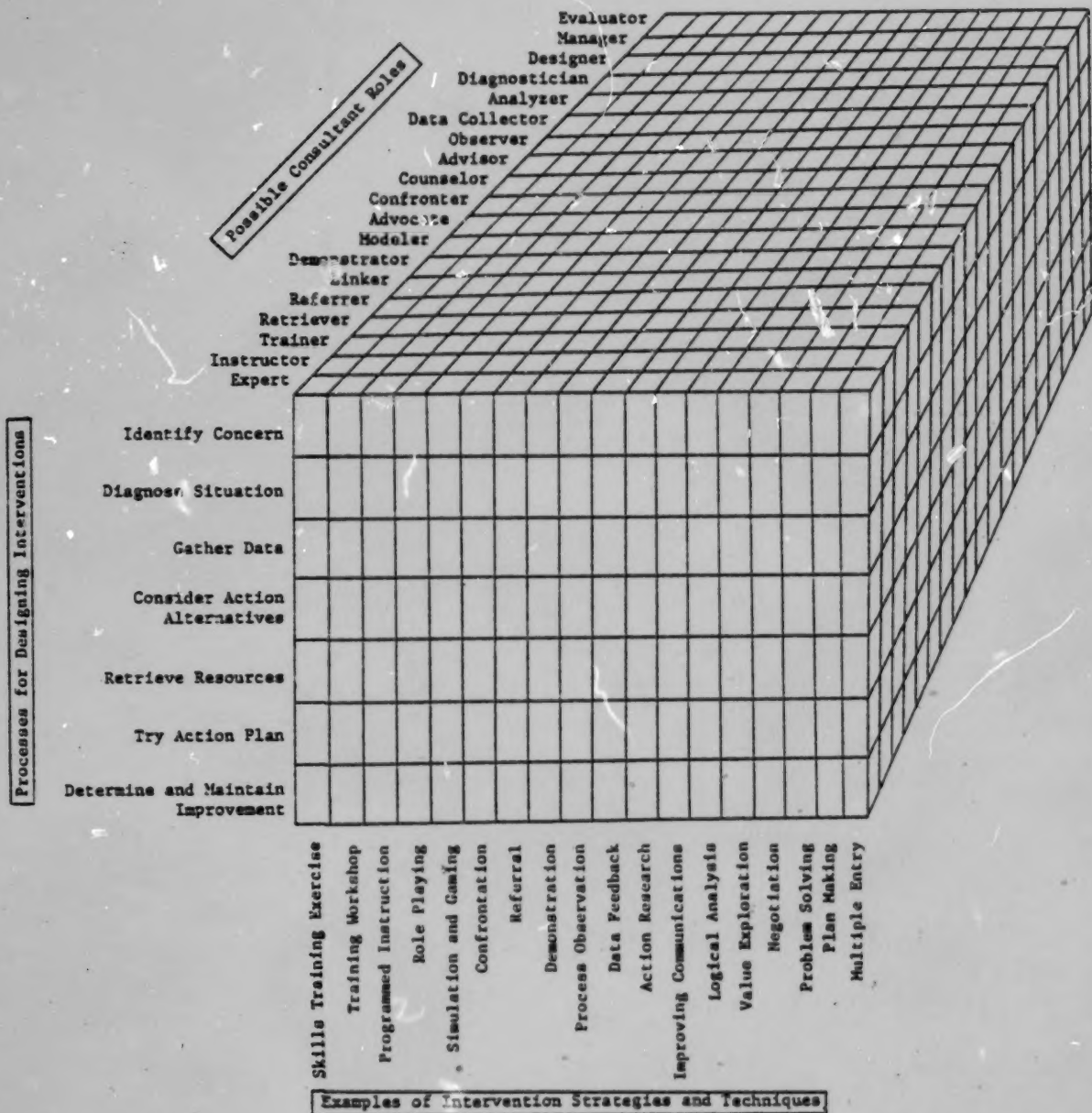


Diagram VI

Differential Intervention Matrix



The second part is a 3-day practicum in which trainees engage in consulting projects with client systems prearranged by the workshop sponsor. The third concludes the training with three days of debriefing, evaluation of the consulting practicum and integrating learnings of the workshop.

Target Populations

The population of potential trainees includes educational personnel who occupy or seek roles with responsibility for staff training, organization or program development, or implementation of instructional or organizational innovations. These trainees are expected to come from private and public educational systems such as state departments of education, school districts, universities and educational associations. It is expected that trainees will have become involved in the training through their own personal commitment rather than as a result of imposed requirements of any kind.

Trainees are required to have completed several other instructional systems developed by NWREL or to possess equivalent experience. These systems include *Interpersonal Communication*, *Research Utilizing Problem Solving*, *Interpersonal Influence* and *PETC-I: Skills Training*. It is assumed that these prerequisite workshops provide trainees with important knowledge and experience which form the foundation for *PETC-II* training. It is also assumed that training will be more productive when all trainees in a workshop have become familiar with the norms and values of the learning style employed by these systems. A more detailed description of this experience-based, "peer supported" and personalized learning style may be found in the *Preparing Educational Consultants (PETC-I): Skills Trainers Workshop Instructional Strategies* (Pino and Emory, 1972, p. 5).

A draft of a set of guidelines for selecting trainers has been produced by the developers. In general, these guidelines stipulate that the trainer must have completed all three *PETC* systems and their prerequisites and must show evidence of certain specified knowledge, skills and attitudes.

The kinds of organizations that are expected to sponsor *PETC* training include private and public educational institutions such as universities, colleges, state departments of education and school districts. Potential client groups of *PETC-II* consultants generally include intact task groups of educators who are experiencing some kind of problem or difficulty that is keeping them from reaching their goals. However, any subsystem of an organization which desires help in improving its effectiveness is considered an appropriate *PETC-II* client.

EVALUATION METHOD

This chapter provides a brief description of the evaluation model and rationale and summarizes the major evaluation activities conducted during the field test milestone. More detailed descriptions of these activities are presented in Appendix A.

EVALUATION MODEL AND RATIONALE

The model in this description was not rigorously applied but served as a conceptual and procedural organizer for much of the evaluation work. It is presented here to help the reader better understand the overall nature of the evaluation and its rationale.

For this report, evaluation is conceived as the determination or assessment of value or merit. The product evaluated is the *PETC-II* instructional system. Since it is a fairly complex system, different aspects of the product were singled out for evaluation. These included (a) need or justification for the instructional system, (b) rationale, goals and objectives, (c) training content, (d) instructional procedures, (e) training effectiveness and (f) participant satisfaction. Appropriate evaluation criteria were then identified for each aspect evaluated. The ultimate decisions as to which aspects of the *PETC* system to evaluate and which criteria to apply were based on the expressed and projected information needs of the major evaluation audiences identified earlier on page 2. Another step in the evaluation consisted of identifying the important information sources, that is, those who would apply the evaluation criteria in making judgments about the various aspects of the *PETC* system. An example of the outcome of this process is the following statement: participants (information source) should consider the goals

and objectives (aspect) an important criterion. Table 1 provides a summary of the aspects of the system evaluated, the information sources tapped for each aspect and the criteria used to evaluate each aspect. Instruments were also developed from this information. A summary of the field test evaluation instruments is presented in Table 2, page 20, indicating the information sources, time administered and the expected information from each instrument. It should be noted that different information sources, for example, participants or trainers, evaluated a given aspect of the workshop, from different viewpoints, applying different criteria.

In order to determine the evaluation information specifically needed for the field test, the evaluator reviewed all needs that had been identified through earlier evaluations and communications with NIE. The existing information was reviewed for adequacy and a list of remaining information needs was prepared. Each need was rated to obtain adequate information as to its relative importance and the relative cost. The activities described below were designed to address the highest ranking information needs.

FIELD TEST EVALUATION ACTIVITIES

Five activities were conducted for the field test:

1. An evaluation of the *PETC-II* field test workshops
2. The consultation case studies
3. A summative review
4. An alternatives search
5. A survey of potential users

Each of these activities is briefly described in the following section.

Table 1

Evaluation Information Requirements

Aspect Evaluated	Information Source	Evaluation Criteria
Need or Justification	Potential Participants	Perceived importance of PETC staff development functions Usefulness of PETC in meeting staff development goals Perceived need for educators with process consulting abilities Personal interest in attending PETC workshops Willingness to expend necessary resources for PETC training
	Alternatives Search	Relative value compared to alternative similar training
Rationale, Goals and Objectives	Participants	Clarity Personal significance
	Reviewers	Clarity Conceptual integrity Social significance Explicitness of claims and disclaimers
Training Content	Participants	Relevance for learning to be a consultant Clarity of presentation and definition Parasimony (little or no unimportance or not useful material) Practical significance for successful consulting Appropriateness given trainee's experience and understanding Demanding original thinking Interest Usefulness of the major conceptual models Usefulness of the pretraining materials
	Reviewers	Conceptual adequacy Theoretical significance Practical significance for successful consulting Empirical justification for consulting practices recommended Clarity of definition and presentation Appropriate emphasis of content elements Adequate integration of content elements Parasimony Sufficiency
Instructional Procedures	Trainers	Extent of content issues or problems emerging during workshop
	Participants	Appropriateness for learning to be a consultant Practical usefulness in learning consulting skills Efficient use of time Value of the practice exercises Usefulness of the training structure Amount of time for reflection and personal growth
	Reviewers	Appropriateness for system's purpose Appropriateness for system's content Appropriateness for system's intended population
	Installers	Feasibility of recruiting participants and clients Usefulness of recruitment information
	Trainers	Ease of administering or managing the workshop Clarity of the trainer role Feasibility of the trainer role Interest of the trainer role Challenge of the trainer role Extent of procedural issues or problems emerging during the workshop
Training Effectiveness	Participant	Amount of consulting provided after training Kind of consulting provided Self-perceived helpfulness to their consulting to client groups Expectations to provide future consulting services Informal (non consulting) use of training Self-perceived consulting competence
	Practicum Clients	Satisfaction with the consulting practicum Helpfulness of the consulting practicum Expected changes due to consultation
	Clients of PETC Graduates	Perceived accomplishments and changes due to consultation Perceived progress in achieving the eleven objectives for client groups (p. 11) Perceived progress of the consultant in meeting the PETC performance objectives (p. 207)
Participant Satisfaction	Participants	How worthwhile the workshop was perceived Whether the workshop came up to expectations Value of the workshop relative to other professional education courses Value of workshop relative to its costs in time and money

Table 2

Field Test Evaluation Instruments

Instrument	Information Source	Time Administered	Information Expected
1. Background Questionnaire	Workshop participants	Preworkshop	Biographical information and information about workshop expectations and previous consulting experience
2. Client Questionnaire	Workshop practicum clients	Postconsulting practicum	Client reactions and perceptions of the consulting experience
3. Final Questionnaire	Workshop participants	Postworkshop	Participant perceptions of the value of the training procedures and content
4. Interview Schedule	Workshop trainers	Postworkshop	Trainer perceptions of the feasibility of the training strategies
5. Interview Schedule	Workshop installer	Postworkshop	Adequacy of orientation and installation materials and procedures
6. Trainer Log	Workshop trainers	After each workshop session	Documentation of adherence to the training design and workshop problems
7. Followup Interview Schedule	PETC-II graduates Past PETC-II participants	Postworkshop, September 1975	Description of significant workshop learnings, amount and kind of consulting, satisfaction with training
8. Consulting Log	PETC-II graduates	At time of Followup Interview	The amount and kind of consulting done following participation in the workshop
9. Review Guidelines	Summative reviewers	October 1975	Merit of the instructional materials for training in process consultation
10. Alternatives Search Questionnaire	Specialists in staff development, OD, and process consulting	October 1975	Comparative information about alternative means of gaining training in process consultation
11. Survey Questionnaire	Potential users	October 1975	Perceptions of educational need for process consultation and training

Workshop Evaluations

As part of the *PETC-II* field test evaluation activities three workshops were conducted--two in Seattle, Washington, and one in Fairfax, Virginia. The purposes for offering these workshops were:

- (a) to obtain evaluative data on the efficacy under field conditions of the instructional materials following their final revisions and
- (b) to provide a series of case studies of the consulting performed by field test participants following their training.

Three field test workshops were designed to closely simulate the kinds of field conditions in terms of trainees, trainers and environment expected for workshops offered following release of the system to publishers. A copy of the installation guidelines and registration material is provided in Appendix E. (The workshop installer is a representative of the sponsoring institution who has the responsibility for recruiting participants and clients as well as for making arrangements for facilities and refreshments, etc.)

Evaluation instruments were administered before and after the workshops to produce the necessary evaluation information. These instruments are summarized in Table 2. Judgments and reactions were obtained from the workshop trainers and installers on the adequacy of the installation and training materials. Participants provided information about training costs and satisfaction with the training content and procedures. Reactions of the practicum clients were also assessed.

Consultation Case Studies

Participants at the three field test sites and two of the interim sites, Portland and Eastern Washington, were interviewed as part of the

consulting case studies. Information was collected regarding the amount and kind of consulting done since training, participant perceptions of the usefulness of the training and a judgment of the appropriateness of the workshop content and strategies. Additionally, information was collected to determine participants self-evaluations of their consulting ability. A log was completed by those *PETC-II* graduates who had consulted to provide additional information on their experiences.

Summative Review

A 4-day summative review of the instructional system was conducted at the Northwest Regional Educational Laboratory. The four reviewers selected were Gene Mulcahy, Trustee of the Knox Foundation and former Director of Shanti School, Hartford, Connecticut; Ann Burr, elementary school teacher and member of the Cadre of Organizational Communication Consultants, Eugene Public Schools, Eugene, Oregon; Bunyan Bryant, Assistant Professor, School of Natural Resources, University of Michigan and former member of the Educational Change Team, Ann Arbor, Michigan and Bonard Wilson, consultant with the Leadership Institute of Spokane and former UNESCO Consultant to the Ministry of Education, Indonesia, Rhodesia, Panama and the Phillipines. The reviewer selection process is described in Appendix A. The reviewers were asked to write a critique of the *PETC* instructional system that addresses the following items: rationale and goals, target populations, content, instructional procedures, trainer role and potential side effects.

Alternatives Search

The alternatives search was conducted to identify and describe alternatives to the *PETC* series for providing training in consulting and organizational development. Over 100 letters requesting information were

mailed to people and institutions associated with process consulting and organizational development. This procedure identified 35 instructional systems; 12 of these were judged to be similar to *PETC*. These 12 systems were then compared with *PETC* for target population, training content, instructional procedures, expected outcomes, trainers and dissemination.

Survey of Potential Users

The survey of potential users assessed the extent to which members of the target population believe an educational need exists for *PETC*, and their personal interest in *PETC* training. The Survey Questionnaire was mailed to a random sample of 264 educators in staff development positions to collect this information. A return rate of 38 percent was reached when 100 questionnaires were returned.

A NOTE ON TESTING

At the field test stage of development in the Improving Teaching Competencies Program it is normally expected that cognitive or behavioral data will be obtained to determine the effectiveness of the workshops in helping participants acquire mastery of concepts and skills. The evaluation design does not call for either of these kinds of data in a manner normally expected.

During the interim stage of development two different lines were followed in developing cognitive tests for assessing conceptual gains from the workshop. Through these efforts it became apparent that developers were not principally concerned with cognitive mastery of the *PETC-II* content. The focus of the training is on providing trainees with experience in a consulting process and the emphasis is on learning process skills to build helping relationships with client groups or

diagnose a client's problem or difficulty. Thus cognitive tests were abandoned as a way of assessing training effectiveness. (See *Interim Evaluation Report for Preparing Educational Training Consultants: PETC-II*, January 1976).

An attempt was also made to assess consulting ability, specifically the consulting process skills, through a simulation. Numerous technical and operational difficulties resulted in the abandonment of this effort (see the Interim Technical Report), and evaluation work began to focus on perfecting procedures for assessing consulting performance in actual consulting projects of consultants following their training in the workshop. The senior author contends that given the time and resources available, the most appropriate kind of information obtained was that about the actual effectiveness of PETC consultants in forming consulting relationships with clients and in helping their clients improve their group process skills and achieve their goals.

EVALUATION RESULTS

This chapter provides an integrated summary of the results of the five evaluation activities. More detailed presentations of the results and supporting data are given for each activity in Appendix A. The results in this chapter are organized into the major aspects of the instructional system that were evaluated: (a) need or justification, (b) rationale, goals and objectives, (c) training content, (d) instructional procedures, (e) training effectiveness and (f) a summary of general indicators of participant satisfaction with the workshop. For each area the information sources and evaluation criteria are explicated and the results summarized. Page references to supporting data in Appendix A have been provided for those readers who wish more specific information.

NEED FOR JUSTIFICATION

Justification for the development of an instructional system, such as *PETC*, in organizational process consulting should be based in part on the perceptions of need for such training by the educational community and on the availability of such training through existing alternatives. Accordingly, evaluation focus was placed on: (a) a survey of potential *PETC* participant perceptions of the need for *PETC*-like training and their personal interest in such training and (b) a search for existing alternatives for training in process consulting and a comparison of these alternatives with *PETC*.

The evaluation criteria applied in the assessment of need were:

- (a) potential participants should consider staff development functions addressed by *PETC* to be important in meeting their program and personal

goals, (b) provided with a description of *PETC*, potential participants should consider it useful for meeting their personal and their program staff development goals, (c) potential participants should believe there is a definite need in the educational community for educators with group process consulting abilities, (d) potential participants should consider both their institutions and themselves to be willing to expend the necessary energy, time and money to take *PETC*-like training and (e) potential participants should indicate a personal interest in attending a workshop such as *PETC* or recommend such a workshop for their staff development programs.

Analysis of the results showed that all of these criteria were met except, perhaps, potential participants' willingness to expend the necessary time and money. Of the respondents to the survey, 49 percent indicated that their institutions would "definitely not" (6 percent) or "probably not" (43 percent) be willing to pay the costs in time and money described in the accompanying description of *PETC* (page 217). But there remained a sizable proportion of respondents who indicated "perhaps" (40 percent) or "yes, definitely" (7 percent). In support of the suggestion that there are a large number of educators who would be willing to commit the necessary resources, 43 percent of the respondents indicated they themselves would allow two weeks or more for such training (page 217). To the contrary, however, only 18 percent thought their institutions would allow two weeks or more.

The remainder of the data supports the conclusion that there is a perceived need for training programs such as *PETC*. All staff development functions were seen as important to both individuals and institutions; 40 percent of the respondents indicated "definitely" and 48 percent

"perhaps" to the potential of *PETC* in meeting their staff development goals (page 216). In relation to need in the educational community for educators with group process consulting abilities, 72 percent thought "definitely" and 23 percent "perhaps" (page 215), while 66 percent indicated a personal interest in such training (page 217). (It should be noted that these results are not statistically generalizable to the population sampled because of the 38 percent return rate.)

Through the search for existing training alternatives in process consulting, 35 instructional systems were identified and 12 were judged to be serious alternatives to *PETC*. These 12 systems were compared with *PETC* on the following dimensions: target populations, training content, workshop procedures, expected outcomes, trainers and dissemination. The results indicated that there are definitely training systems in use which are similar and/or complementary to the *PETCs* and *PETC* prerequisites in at least some of their content and procedures (pages 205, 209). The university programs and *PETC* systems seemed the most comprehensive and integrated (page 210). Some systems presented options not covered by *PETC* (page 209). There was also much which appeared unique to *PETC* (page 209). With the prerequisite systems, the *PETCs* seemed the most comprehensive process training combination for inservice education (page 210).

Compared to alternatives, *PETC* was found to be considerably less expensive per day of training as well as more easily disseminated, primarily because its use is less dependent on the original developers and sophisticated trainers (page 208). Participant materials for the workshop are estimated to cost about \$15 per set. Assuming that there are 18 participants and 2 trainers, the materials would cost \$300. The

workshop requires two trainers for nine days. At \$150 per day the trainer fees would be \$2,700. If \$300 is allotted for supplies and refreshments and if facilities are provided by the sponsoring institution as an indirect cost, then the total cost of the workshop would be \$3,300, or about \$180 per participant. The training would cost approximately \$20 per day per participant, which proved less than any of the alternatives available. *PETC-II*, however, requires a somewhat longer training period. The total cost of training per participant, therefore, was greater for *PETC-II* than for two of the alternative systems identified. If the sponsoring institution provides the trainers, the trainer fees could be reduced somewhat to lower the costs of the training.

The results of these evaluation activities suggest the existence of an educational need for relatively low-cost, mass-disseminable training systems in process training and consultation. Field test participants also agreed with this contention: 86 percent indicated a "definitely strong need" and 14 percent "probably some need" for such training (page 87). The fact that these respondents received free training may have influenced their opinions.

RATIONALE, GOALS AND OBJECTIVES

The judgments of participants and reviewers were obtained for the evaluation of the *PETC* rationale, goals and objectives. For participants, two major criteria were applied: participants should find the goals and objectives clearly understandable and regard them as significant or important. Reviewers were asked to consider the criteria of clarity, conceptual integrity, social significance and explicitness of claims and disclaimers. Participants and reviewers did not respond to the same statements of workshop rationale, goals and objectives. Participants

were limited to the workshop materials while reviewers also examined a number of supporting documents.

The results indicated that participants evaluate the goals and objectives highly. Clarity was rated good or excellent by all but one participant, and significance/importance was rated good or excellent by all participants (page 72).

Reviewers were generally positive in their evaluation of the rationale, goals and objectives. Clarity was judged high by three of four reviewers; Wilson thought the objectives lacked specificity and behavioral definition (pages 142, 180). Conceptual integrity was also judged high (page 142). The broad goal of *PETC*, to improve the organizational effectiveness of educational systems by preparing educational training consultants, was considered very socially significant. However, in another dimension of social significance, social justice, reviewers made their strongest criticisms (pages 142-144). Bryant stated: "In order for *PETC* to become more socially significant it must become more sensitive to issues of social justice and involve minorities and women to more equally share the technology." To support his statement Bryant pointed out that few references in the *PETC* program were made to minorities or women, nor were there training designs by such groups, and the existing designs did not consider issues of racism, ageism, sexism, classism or ethnocentrism. Mulcahy suggested that *PETC* seeks to be value free and equally applicable to all client systems. It ignores the fact that many systems are, by goal and practice, unjust. The *PETC* system can be used effectively to support racist, sexist, ageist and classist goals of educational systems. All four reviewers were in agreement with these criticisms. Bryant then

offered, "Yet it is unfair to 'lay' this on the *PETC* system. Such issues are not raised to browbeat traditional white male consultants or the *PETC* program, but to raise the level of consciousness."

All reviewers thought the claims and disclaimers in the program were generally clear and stated well.

TRAINING CONTENT

Training content refers to the skills, concepts, principles, values and issues that are the subject of the instructional system. The principal sources of information for evaluating the training content were the expert reviewers and field test participants. Training content probably meant something different to the participants and reviewers. Participants focused on their workshop experience as a whole while reviewers focused on the content of the materials per se. The trainers were also asked to note any content issues or problems that arose during the workshop.

The reviewers were asked to consider nine criteria in evaluating the training content: conceptual adequacy, theoretical significance, practical significance for successful consulting, empirical justification for consulting practices recommended, clarity of definition and presentation, appropriate emphasis of content elements, adequate integration of content elements, parsimony and sufficiency. Two reviewers, Mulcahy and Wilson, addressed each criterion systematically and gave the *PETC* content positive evaluations on all of them except parsimony and empirical justification for consulting practices recommended (for which Mulcahy felt there was not sufficient information available, page 169). Wilson criticized the "medical-model" approach to consulting and recommended additional content in affective areas and in helping clients to use consultants (page 181).

Burr thought the content to be "impressively concise and clear, yet outstandingly comprehensive. In my opinion, the program will do what they say it will do--train a person to be an educational training consultant with many skills and knowledge of their use." Burr recommended that the materials be reviewed and edited for sexist structure and language (pages 156, 157).

Bryant thought that in spite of some shortcomings related to social justice, PETC is "probably one of the best conceptual and integrative organizational change and development pieces to date. Much forethought, integration and work has gone into its development as indicated by its clarity, purpose and organization." He recommended that PETC be examined in terms of the kind of skills one needs to work with oppressed groups and also raised issues about a consultant's accountability that may not be adequately addressed in the training (page 150).

Participants evaluated the training content by means of the final questionnaire. They provided ratings on the quality of the materials, the training content, the basic conceptual models and the preworkshop orientation materials. The workshop materials were rated on the criteria of clarity, interest and demand for original thinking. For clarity, 54 percent of the participants checked 5 or 6 on a 6-point anchored scale with 6 being high, 82 percent checked 5 or 6 for interest, and 68 percent checked 5 or 6 for demanding original thinking (page 79). Workshop content was rated highly on the criteria of appropriateness, relevance, clarity, parsimony and practical significance. None of the participants, on the final questionnaire rated the workshop content below "satisfactory" on any of these five dimensions. The percent of respondents checking "good" or "excellent" was 93 percent for clarity,

89 percent for parsimony and 100 percent for practical significance, appropriateness and relevance of content (page 72).

The major conceptual models employed in the system, the differential diagnostic matrix, the differential intervention matrix and the phases of planned change (see page 11) were rated positively for clarity and utility (pages 77-78).

The preworkshop orientation materials were also rated positively in terms of providing the information participants needed (57 percent checked "good" or "excellent") and giving clear and correct expectations (42 percent checked "good" or "excellent", 39 percent checked "satisfactory") (page 81).

The trainers kept logs of their training activities and noted any content issues or problems that arose during the workshop. None of the trainers reported any problems with content (pages 107-109).

In summary, the results suggest that the skills, concepts, principles, values and issues of the instructional system were evaluated very favorably by reviewers, participants and trainers.

INSTRUCTIONAL PROCEDURES

Evaluations of the workshop procedures were obtained from the reviewers, field test participants and workshop trainers and installers.

It should be noted that reviewers had no opportunity to actually observe or participate in any of the training activities. Their evaluations of the workshop methods and procedures are based only on examination of the trainers' manuals. This may have provided a fairly limited perspective of the complex and dynamic training process. Reviewers tended to say less concerning the instructional procedures than other aspects of the system. Bryant noted that "The PETC system was clearly

organized into a meaningful whole, integrating skills, theoretical concepts and activities that went from simple to more complex...with some appropriate duplication of skill building." He thought the materials provided both logic and clarity with respect to planned activities (page 150). Burr applauded the active role of the learner in the system but went on to suggest that the design could be more effective if there was more opportunity for participants to be involved in the actual design of their learning experience (page 156). She thought the training procedures seemed entirely appropriate (page 157). Mulcahy, in his statement about the workshop procedures, noted several strengths and weaknesses that concern the training content as well as procedures. He thought the clarity of the definition of the role of the consultant was impressive but noted the potential for exploitation of practicum client systems and the artificial nature of those groups used as a training device. He also thought identification and definition of these client systems required extraordinary sensitivity on the part of the trainer. Three other issues were noted: there is insufficient support for the difficulties participants have in establishing client relationships in moving from the conceptual level in the training to actual intervention and in helping clients effectively use the consultants' services (page 171). From his examination of the materials, Wilson thought the training procedures were very adequate concerning the cognitive and skills aspects but recommended that t-group kinds of experiences be provided to help participants gain awareness in affective areas (page 183).

The field test participants gave positive evaluations for the workshop procedures on the following six criteria. Procedures were

considered appropriate for learning to be a consultant (100 percent checked "good" or "excellent") and useful for learning consulting skills (93 percent checked "good" or "excellent") and there was efficient use of time (79 percent checked "good" or "excellent") (page 72). The value of the practice exercises and the usefulness of the training structure were rated high (86 percent and 89 percent checked 5 or 6 on a 6-point scale, 6 being high), as was the amount of time provided for reflection and personal growth (86 percent checked 5 or 6) (page 80).

The installers and trainers were interviewed by the evaluator to get their evaluations of the training procedures and installation guidelines. Installers evaluated the workshop procedures in terms of the feasibility of recruiting participants and clients as well as the usefulness of the recruitment information. The trainers considered the ease of administering or managing the workshop, the clarity, feasibility, interest and challenge of the trainer role and whether procedural issues or problems emerged during the training.

Both installers thought they were able to recruit the necessary participants and practicum client groups without serious difficulty. They thought the recruitment information provided participants and clients and the installation guidelines were helpful and probably essential for adequate installation (page 107).

The trainers all reported that while it may not have been easy, the workshop was very manageable and session-by-session directions to the trainer were adequate. They thought the trainer role was clear, feasible, interesting and challenging. Some problems were reported concerning the workshop environment and interpersonal problems of participants (pages 107-109).

The trainers were asked to keep session-by-session logs of their training experience to note any problems that occurred with workshop procedures. There were no reports of major modifications in the workshop design and no major problems were noted (page 108).

In summary, the instructional procedures were evaluated favorably by reviewers, participants, trainers and installers. The reviewers indicated some potential problems and inadequacies with the procedures.

TRAINING EFFECTIVENESS

As noted in Chapter 2 on evaluation methods (page 23), cognitive and behavioral data on consulting knowledge and ability, which many will consider the most important information on training effectiveness, was not successfully obtained in the evaluation of *PETC-II*. Numerous technical and operational difficulties resulted in abandonment of attempts to provide this information. However, an extremely important criterion of the effectiveness of *PETC-II* is the extent to which the clients of *PETC* graduates perceive there to be (a) accomplishments and changes in their situation due to the consultation, (b) progress in achieving the 11 objectives for client groups (see page 10) and (c) progress on the part of the consultant in achieving the *PETC-II* performance objectives (see page 232). Instrumentation (pages 285-287) and procedures (pages 22, 111) were designed to provide this information. At the end of the workshop, participants were provided with copies of consulting logs to document their future consulting activities. They also received pre- and postquestionnaires to give the client groups they consulted with. All of the field test participants agreed to obtain and provide this information. However, no questionnaires or logs were returned after several months and followup telephone calls to

a sample revealed that these past participants (a) were not consulting, (b) did not have the time or would forget to complete the consultation logs at the time of consultation and (c) did not administer the client questionnaires for several reasons; for example, they forgot, or it seemed an inappropriate way to begin the consulting relationship. When it became apparent that the expected data was not forthcoming, the evaluation procedures were revised to obtain interviews from these past participants. Thus, the only data available on effectiveness are the perceptions of participants and clients of the workshop practicum.

Since a major purpose of the *PETC-II* system is to provide process consultation resources to educators, an important criterion of effectiveness is the amount of consulting actually provided by *PETC-II* participants after their training. This information was obtained along with additional information to illustrate the kind of consulting they provided. For example, information was gathered on the kind of client groups they worked with, the nature of the problems they worked on and their perceived helpfulness to the client. Other related effectiveness criteria were participant expectations for providing future consulting services and informal nonconsulting use of their training.

An additional criterion of effectiveness consisted of the self-perceived consulting competence of *PETC* participants. They rated themselves on a 5-point scale of competence (page 272) in the performance objectives of the workshop (page 232).

Finally, since a sample of consulting is actually provided during the workshop, i.e., the practicum consultations, ratings on the value of that experience were obtained from the practicum clients.

In summary, three kinds of information obtained pertained to training effectiveness; these consisted of participant and client

perceptions of the value of the workshop practicum, information about the amount and kind of consulting done by *PETC-II* graduates following their training, and self-perceived consulting competence of past *PETC* participants. The results are summarized below.

The participants thought the practicum was a valuable experience. On the final questionnaire, 93 percent of the participants checked 5 or 6 on a 6-point anchored rating scale with 6 being the high point. The participants were asked to list factors contributing to their satisfaction, and these responses are included in Appendix A (pages 83-84).

The practicum client satisfaction was also assessed. On the practicum client questionnaire, all but one of the respondents indicated satisfaction, with 23 of the 42 "very pleased" with the consulting experience. Thirty-seven of the forth practicum clients felt the consulting experience was helpful; three felt the experience was of little help to them. Additionally, most of the client respondents indicated that the sessions were open and frank (pages 96-104).

The practicum clients were asked to list a change they intended to make as a result of the consulting experience. All but two of the respondents were able to identify a specific change they intend to make, however, this provides a weak measure of trainee success. The categorized responses to this question are included in Appendix A (page 103).

Information was collected on the followup interview on the amount and kind of consulting done by *PETC-II* graduates. Of the 41 participants interviewed, 25 had consulted. The amount of consulting ranged from 1 to 25-30 times. Of those who consulted, over half consulted from 1 to 4 times. An analysis was done of the amount of consulting after

training of those with no prior consulting experience. Of the nine respondents who indicated that they had no prior consulting experience, five had consulted after training, four did not (pages 112-115). An analysis of the effect of one's professional role on the amount of consulting done indicated that for this sample, administrators were more likely to consult than nonadministrators. A table of the frequency of consulting by professional role is included in Appendix A (page 116).

Those who had not consulted were asked to list the reasons given for not consulting. Eleven people indicated that they had insufficient time to consult. Six people indicated that their professional role did not include the possibility of consulting, and five people responded that no one had requested consulting help. Four responses indicated that the respondents are not seen as consultants in their present role. Six people gave some other response (page 117).

Appendix A includes a description of the size of the client groups, the method of payment, how the client group was referred to the consultant and the duration of the consultations. Additionally, information on the type of client group, a description of the problem, the consultant's goals for the client and information from the consultant on the outcome of the consultation is included in Appendix A. As was expected, the consultants worked on a wide range of client problems and goals. Thirteen of the thirty-three consulting situations involved the consultant planning or conducting a workshop or training (pages 120-126).

Twenty-seven of the consultations were reported to have positive outcomes; two consultations were reported to have both positive and negative outcomes, and two consultations were reported to have negative

outcomes. No outcome information was available for two of the consultations. This indicates the consultants felt their consultations had been helpful to the client in solving its problems (page 119).

During the followup interview, *PETC-II* graduates were asked if they planned to do consulting in the future. All but one of those responding to the question indicated they planned to do consulting in the future. Eighteen of those had definite plans to do consulting, and sixteen hoped to do consulting sometime in the future (page 129).

All but one of the respondents indicated that they had used the training in less formal ways than actual consulting. These included: identifying areas of needed organizational change, helping a group develop a program or organization for meeting a goal, organizing and planning their own efforts to help a group, helping their own group through a change process and helping someone understand a potentially destructive experience in a group or organization as part of a counseling process (page 127).

Two measures were utilized to provide a rating of consultant competence: the practicum client questionnaire and the followup interview of *PETC-II* graduates. The practicum clients rated the consultants positively as to their competence in areas of needed help. On the practicum client questionnaire, all but one of the respondents rated the consultants generally competent in areas where help was needed (page 100).

The *PETC-II* graduates, during the followup interview, rated their own ability in 18 areas of consulting experience. The results are shown in Appendix A (page 130). The graduates rated their ability on a 5-point anchored rating scale with 1 excellent ability and 5 unsatisfactory ability. Overall, the *PETC-II* graduates self-ratings of ability

were positive with the mean responses ranging from 1.46 to 2.58. The respondents rated themselves most capable of building a helping relationship, identifying alternative solution strategies and understanding group processes and problems. Respondents rated themselves lowest on helping to build a motivation to change, helping the group generalize and stabilize their change and helping the group evaluate the change and change effort.

In summary, effectiveness was assessed in terms of the value and amount of consulting provided by *PETC* participants. Both participants and clients judged the practicum consulting to be a valuable experience. Information on the amount and kind of consulting done by *PETC-II* graduates following their training was collected and showed that 6 percent had consulted with 1 to 25 client groups and that they felt they had been useful to their clients. Client questionnaires for assessing their perceptions of the value of this consulting were provided, but none were returned. *PETC-II* participants rated their own consulting skills highly.

WORKSHOP SATISFACTION

Four indicators were used to determine participant general satisfaction with the workshop: (a) an overall rating of how worthwhile they perceived the experience, (b) whether the workshop came up to their expectations, (c) how the workshop compares with other professional education courses and (d) the value of the workshop relative to its costs in time and money.

On the final questionnaire, seven of the nine participants at one workshop and all of the participants of the other two workshops rated the workshop as being worthwhile (93 percent checked 5 or 6 on a 6-point

scale with 6 being high, pages 79, 81). After a followup period, participant evaluations were still high with all but one of the respondents on the followup interview evaluating the workshop as being worthwhile and half of the respondents judging it extremely worthwhile (page 129).

Participants were asked to list factors contributing to their workshop evaluations. A wide range of responses was given on both the final questionnaire and the followup interview. The most frequently listed factors on the final questionnaire were: it provided an understanding of consulting with real client and increased confidence as a consultant. The most frequently listed factors on the followup interview were: the personal growth or attitude changes made as a result of the training, the utility of the training and the graduates' use of *PETC* skills. Also listed were the helpful and interesting concepts introduced in the instructional system. The complete list of categorized responses is included in Appendix A (page 134).

The participants were asked if the workshop met their expectations; 89 percent checked 5 or 6 on a 6-point anchored rating scale with 6 being high, indicating that the workshop was successful in meeting participant expectations (pages 81, 82).

The participants rated the workshop positively compared to other professional education courses; 93 percent checked 5 or 6 on a 6-point anchored rating scale, with 6 high. The range was 4 to 6 (page 81).

On the final questionnaire twenty-four of the respondents felt the costs in time and money were small for the outcomes; two respondents felt the costs were about right (page 83). On the followup interview, seventeen respondents felt the costs were small for the outcomes; five

respondents felt the costs were about right for the outcomes (page 136).
(See page 27 for an estimate of *PETC-II* costs.)

In summary, participants indicated satisfaction with workshop on the four indicators used. This satisfaction remained over time as was shown by the positive ratings of the worth of the workshop on the followup interviews.

CONCLUSIONS

This chapter presents the conclusions drawn from the field test and outcome milestone evaluation of the *PETC-II* instructional system. The conclusions are organized into the six main foci of the evaluation: (a) the need or justification for *PETC*, (b) the system's rationale, goals and objectives, (c) the training content, (d) the instructional procedures, (e) training effectiveness and (f) participant satisfaction.

NEED OR JUSTIFICATION

Justification for *PETC* was based on (a) a survey of a national probability sample of potential *PETC* participants' perceptions of the need for process consultation training and their personal interest in such training and (b) a search for existing training alternatives to *PETC* and a comparison of these alternatives to *PETC*. The results support the conclusion that members of the target population strongly believe there is a need for training programs such as *PETC* and have a personal interest in taking such training. The results further demonstrated that training systems exist which are similar or complementary to *PETC* and *PETC* prerequisites in at least some of their content and procedures, and some systems present options not covered by *PETC*. However, *PETC* with the support of its prerequisites seemed the most comprehensive process training combination for inservice education and was considerably less expensive per day of training as well as more easily disseminated, primarily because its use is less dependent on the original developers and sophisticated trainers. It was estimated that *PETC-II* costs approximately \$20 per day per participant.

RATIONALE, GOALS AND OBJECTIVES

Participants of the field test workshops found the goals and objectives of *PETC-II* to be clear and of high significance or importance. Experts in process consultation and organizational development judged the rationale, goals and objectives of *PETC* to be clear, and to have high conceptual integrity, social significance, explicit claims and disclaimers. They criticized *PETC* for ignoring social justice issues such as racism, sexism, classism and ageism.

TRAINING CONTENT

The training content, or the skills, concepts, principles, values and issues that are the subject of the instructional system were evaluated very favorably by workshop participants and expert reviewers.

Nine criteria were considered by reviewers: conceptual adequacy, theoretical significance, practical significance for successfully consulting, empirical justification for consulting practices recommended (some thought there was insufficient information to apply this criterion), clarity of definition and presentation, appropriate emphasis on content elements, adequate integration of content elements, parsimony (rated less highly than other criteria) and sufficiency. Reviewers made some specific criticisms and recommendations that are summarized in the report but there was no general agreement for them.

Participants rated workshop content using the criteria of relevance for learning to be a consultant, clarity of presentation and definition, parsimony (little or no unimportant or unuseful material), practical significance for successful consulting, appropriateness for their level of experience and understanding, demand for original thinking,

usefulness of major conceptual models and usefulness of the pretraining materials (rated lower than other criteria). The trainers reported no content issues or problems.

INSTRUCTIONAL PROCEDURES

The procedures and methods of the *PETC-II* system were also evaluated favorably. Participants considered them appropriate for learning to be a consultant. They were also viewed as practical and useful for learning consulting skills. They thought the practice exercises were valuable, the structure useful, and were pleased with the amount of time for reflection and personal growth. However, they downrated the workshop for efficient use of time.

Reviewers were also positive in their evaluations of the workshop methods and procedures. Some criticisms were also noted: (a) the potential for exploitation of practicum clients, the artificial nature of those groups used as a training device, the extraordinary sensitivity required of the trainer and installer in the identification and definition of the client systems and (b) insufficient support for the difficulties participants have in establishing client relationships, moving from the conceptual level in the training to actual intervention, and in helping clients effectively use the consultant's services.

The installers and trainers found the methods and procedures more than adequate from their point of view and reported no major difficulties or problems. The trainers found their role clear, feasible, interesting and challenging.

TRAINING EFFECTIVENESS

Satisfactory data was not obtained to judge the effectiveness of the workshop in helping participants achieve specified cognitive or

performance outcomes. Nor were evaluation procedures successful in providing data to assess the effects of consulting on the client groups of *PETC* graduates.

The results did show that 61 percent of the people trained went on to engage in from 2 to 25 consultations following the *PETC-II* workshop. More specific information was obtained on 33 of these consultations and is summarized on page 120. Twenty-seven consultations were reported to have positive outcomes.

On a followup interview all respondents but one planned to provide or continue providing consulting services. All but one of the respondents also reported they had found the training useful in less formal ways than actual consulting. Respondents also provided ratings of self-perceived competence in 18 areas of consulting ability. Their ratings were generally high.

Clients of the workshop practicum provided an indication of the effectiveness of the participants' training. On a questionnaire following their consultations, all but one respondent indicated the experience was satisfactory and 23 of the 42 were "very pleased"; 37 of 40 respondents thought the experience was helpful; all but one rated the consultant to be competent in areas where help was needed.

These results suggest that the training is effective in preparing at least half of the participants to provide successful consultations (from their own perspective and from the perspective of clients of the workshop practicum). However, further data is needed to determine the effects of this consulting on client groups.

PARTICIPANT SATISFACTION

Participants' general satisfaction with the workshop was rated highly on four indicators: the workshop was judged to be very worthwhile, as generally coming up to or exceeding expectations, as comparing favorably with other professional education courses and as well worth the costs in time and money.

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Appendix A:

METHODOLOGY AND RESULTS OF THE
EVALUATION STUDIES

METHODOLOGY AND RESULTS OF THE EVALUATION STUDIES

CONTENTS

EVALUATION OF THE PETC-II FIELD TEST WORKSHOP	35
Methodology	35
Results	71
CONSULTING CASE STUDIES	111
Methodology	111
Results	112
INTERNAL SUMMATIVE REVIEW	137
Methodology	137
Results	142
ALTERNATIVES SEARCH	191
Methodology	191
Results	191
SURVEY OF POTENTIAL USERS	211
Methodology	211
Results	211

METHODOLOGY AND RESULTS OF THE EVALUATION STUDIES

Five somewhat independent evaluation activities were conducted in the field test and outcome milestone periods. The results of these studies were provided in the report as an integrated summary. Detailed descriptions of the methodology and results for each of the five evaluation activities are presented in this appendix.

EVALUATION OF THE PETC-II FIELD TEST WORKSHOPS

As part of the PETC-II field test evaluation activities three workshops were conducted--two in Seattle, Washington and one in Fairfax, Virginia. The purposes for offering these workshops were: 1) to obtain evaluative data on the efficacy under field conditions of the instructional materials following their final revision, and 2) to provide a series of case studies of the consulting performed by participants of the field test workshop following their training. (The results of the consulting case studies are presented in the second section of this appendix.)

Methodology

Three field test workshops were designed to closely simulate the kinds of field conditions in terms of trainees, trainers and environment expected for workshops offered following release of the system to publishers. Evaluation instruments were administered before and after the workshops to produce the necessary evaluation information. Judgments and reactions were obtained from the workshop trainers and installers on the adequacy of the installation and training materials.

Participants provided information about training costs and satisfaction with the training content and procedures. Reactions of the practicum clients were also assessed.

This section consists of a description of the three field test sites, the participant populations and the evaluation instruments.

Description of the Field Test Sites

Installation of the PETC-II workshop should be understood in the context of the installation of the entire PETC system, including the prerequisite workshops. The following sections describe the overall process of installing the PETC program including specific information about the PETC-II installers and trainers. A description of the Seattle test site is provided first and is followed by a description of the Fairfax site.

Seattle workshop A and workshop B. The two workshops held in Seattle were similar in several respects. Participants from both workshops were recruited by the same installer from a single larger group of people who had taken most of the prerequisites together. Both were held in the same facilities, and both shared one trainer. Therefore, Seattle A and B are presented together in this description. The first workshop, Seattle A, was held in December, 1974, and the second, Seattle B, was held in January, 1975.

Historical antecedents to the introduction of PETC into the Seattle Public Schools can be traced to 1966, when the Superintendent of Schools initiated a study of pupil personnel practices, which led to a series of programs designed to expand, upgrade and reorganize student services. Some of these programs used federal, state and local monies to provide

inservice training in areas of communication, team building, problem solving, conflict management and organizational development to increase the training and helping skills of pupil personnel workers.

By invitation of NWREL, two representatives from the district attended one of the ITCP workshops and then replicated the workshop for selected district personnel. This initial experience was well received and led to further explorations of involvement in other ITCP workshops. A public meeting was held in which it was determined that enough interest existed to begin seeking endorsement of the central office administration.

Once the decision was made to install the PETC program, activities began on several fronts to gain administrative authorization and support, to involve people who would ultimately experience the training in early planning and begin participant recruitment. A planning committee was formed to initiate enrollment procedures, identify selection criteria and circulate information and enrollment forms to district personnel.

Federal training funds were identified to cover the cost of installing RUPS, IPC, INF and PETC I and arrangements were made with NWREL to make Seattle a field test site for Social Conflict and Negotiative Problem Solving, PETC-II and PETC-III.

The initial contacts from NWREL were directed to the district Department of Planning, Research and Evaluation. Since, in their perception, the ITCP training programs seemed to refer to human relations areas, the Field Relations Director of ITCP was referred to the Human Relations Task Force and the Program Manager of the Conflict Resolution Training Program, James Forneris, who accepted the responsibility for installing the PETC program.

The installer had responsibility for obtaining approval and support of the necessary district decision makers, recruiting and orienting participants and client groups, and making all necessary arrangements for facilities and scheduling of the workshops.

The workshop trainers were selected by the ITCP Field Relations Director. The criteria used in the selection of the PETC-II trainers included: 1) completion of all PETC workshops and prerequisites, 2) an informal estimate of training ability, 3) physical proximity to the workshop site, and 4) availability. It is also a recommendation of the developers that two people are needed to train PETC-II and that at least one of them should have previously co-trained the workshop.

The two trainers for the Seattle A workshop were Bob McGlone and Dean Gaudette; for Seattle B, Bob McGlone and Jack Martin were the trainers. These three people had completed all three PETC workshops and their prerequisites. Bob McGlone had co-trained PETC-II with Jack Tesmer at a workshop in Eastern Washington in the summer of 1974. Bob McGlone also had extensive experience in human relations and group process training and had developed a number of workshops in various human growth areas. Neither Dean Gaudette nor Jack Martin had previously been trainers for PETC-II; both had fairly limited experience in conducting or designing workshops other than the ITCP workshops.

Fairfax. The Fairfax workshop was conducted in February of 1975 with ten participants from the Fairfax County School District.

Historical antecedents to the Fairfax workshop began during the early 1970's when the Office of Staff Development and Training

(OSDT) of the Fairfax County School District was given the responsibility for developing and implementing a management training program, and improving the coordination of the Staff Development and Training efforts within the district.

In addition to the assigned responsibilities, the OSDT, on its own initiative took on the tasks of (1) improving the quality of training by exploring alternative ways of training trainers, (2) pursuing alternatives for helping resolve conflict, competition and distrust within the district, (3) improving the communications and planning of staff development functions within the district, and (4) attempting to implement a systems approach for providing training functions. Over a three year period workshops and courses were offered in a variety of topics such as evaluation, discriminatory behavior, community expectations, leadership and legal aspects of education. Several ITCP workshops were also offered. It was fairly expensive to bring in external consultants to provide this training and no internal staff were being trained to help district employees deal with a number of problems that had been identified. As a result OSDT began exploring alternatives for developing their own training, consulting and OD capability. An informal needs assessment was conducted which tended to support such a program.

During the early fall of 1973 an area superintendent implemented a Northwest Regional Educational Laboratory program (RUPS) for 24 selected area staff, principals and assistant principals. During the week of the training the area superintendent invited the Office of Staff Development and Training to visit and observe the program and

to discuss the program with the NWREL representative, Dr. Bill Ward. Bill Symons, Director of OSDT, visited the Area I office, talked with participants in the program and met and discussed the Preparing Organizational Development Specialists (PODS) program with Bill Ward. (PODS consisted of PETC and its prerequisites.) The participants were very enthusiastic and complementary of the training, and the area superintendent was interested in pursuing implementation of the PODS program.

At this point Bill Symons initiated a series of activities to determine if the PODS program was feasible and appropriate for the district staff development and training needs. These included the identification of training funds, arranging for college credit for the workshops and making a series of presentations to the district management. As a result of these activities, the PODS program was accepted on a trial basis.

Bill Symons became the installer for the PODS program. After receiving formal approval from the superintendent, he provided information about the program to the superintendent's staff and requested that they identify selected members of their staff to become members of an internal training and OD cadre. A cadre of 24 was formed and began its first week of training in Interpersonal Communications in the spring of 1973. Other workshops in the PODS series were completed in 1974 and PETC-II took place in the winter of 1975.

The trainers for PETC-II were recruited using the same criteria applied in Seattle (page 38). The trainers were Dean Gaudette and Jack Martin; they had each been co-trainers with Bob McGlone for Seattle A and Seattle B, respectively.

Description of the Participant Populations

All test populations were recruited under the direction of the ITCP's Office of Field Relations and Dissemination. In this section is presented a description of participants and practicum client groups for the three field test workshops. The participants are discussed first for each site. The recruitment process is summarized and participant biographical information, previous consulting and training experience and expectations are provided. Following this the practicum clients are discussed.

As discussed above, the participants for both Seattle workshops were drawn from a composite group of individuals who had been selected by the workshop installer for training in all three PETC workshops and prerequisites.

Participants. Fliers describing the overall training program were circulated through the district and quotas were set for various subsystems in the district. Approximately 110 applications were received. These people attended a meeting in which the program was described and discussed. A committee was formed to determine selection criteria and make the final selection of 70 participants to begin the program. Of these 70, 50 were expected to complete PETC-I, 25 were expected to complete PETC-II and 20 would complete PETC-III. By the time these people began PETC-III, they had already become well acquainted with each other.

There were nine participants in the Seattle A workshop, and ten participants in the Seattle B workshop. However, only eight returned biographical information from the first, and one individual from the second did not complete the workshop. Therefore, the remainder of the report shows data for nine participants for each workshop.

The participant recruitment process was somewhat different in Fairfax. In Seattle there was open recruitment across the district for an initially large group of participants which was later reduced for succeeding programs. In Fairfax the superintendent staff members personally selected a given number of candidates from their own staff to form a fixed cadre of 24 participants who would complete the entire PODS program. The selection criteria called for staff members who already performed training and consulting tasks on their jobs, who could provide released time to be trained and to train others and were the primary decision makers concerning staff development.

The following biographical information was collected from participants. The two Seattle workshops were composed mainly of educators in counselor, social worker and psychologist roles: seven in Seattle A and six in Seattle B. There was also one administrator in Seattle A and three administrators and one teacher in Seattle B. The Fairfax workshop consisted of six administrators and four counselor/psychologists.

The educational background of participants was similar for all three workshops: all eight Seattle A participants had received master's degrees in education; in Seattle B, eight had master's degrees and two had bachelor's degrees, and in Fairfax nine had master's degrees and one had a doctorate.

There were two female and six male participants in Seattle A, and six female and four male participants in Seattle B. In Fairfax, there were seven male and three female participants.

The median age for Seattle A participants was 35 years; for Seattle B, 43 years; and for Fairfax, 35 years.

Biographical characteristics of the participants for all three field tests workshops are summarized in Table A1.

Table A1
Biographical Characteristics of Participants at Each Site

Biographical Characteristic	Site			N	Total Percent ^a
	Seattle A	Seattle B	Fairfax		
Number of Participants	9 ^b	10 ^c	10	29	
Professional Role					
Teacher	0	1	0	1	4
Administrator	1	3	2	6	21
Counselor/Psychologist	7	6	4	17	61
Other: Consultants, Trainers, Curriculum Specialists, etc.	0	0	4	4	14
Educational Background					
BA/BS	0	2	0	2	7
MA/MS	8	8	9	25	89
Ph.D./Ed.D.	0	0	1	1	4
Sex					
Male	2	6	7	15	54
Female	6	4	3	13	46
Median Age	35	43	35		

^aBased on the 28 that responded.

^bOnly 8 provided biographical information.

^cTen supplied biographical information; however, one participant did not complete the workshop.

Information about participants' previous training and consulting experience was obtained. Part two of PETC-I is a practicum training experience in which participants are trainers for a secondary group of participants. Since they had all taken PETC-I, all PETC-II participants had at least one experience in conducting workshops. Three participants from Seattle A reported experience in conducting workshops other than those developed by ITCP at NWREL. One person from

Seattle B had conducted INF and two had conducted IPC; seven reported conducting workshops other than ITCP. Seven of the ten Fairfax participants had conducted INF and eight had conducted IPC. Seven reported experience in conducting non-ITCP workshops.

The average hours experience in conducting non-ITCP workshops was 39 for the three Seattle A participants and 85 for the seven Seattle B participants that reported such experience. This information was not available for Fairfax.

All participants from the three workshops had completed the four prerequisite workshops, IPC, RUPS, INF and PETC-I. The Seattle participants had also completed a prototype version of the Social Conflict and Negotiative Problem Solving workshop which is recommended as a prerequisite to PETC-III. Six of the eight respondents from Seattle A said they had taken classes in organizational theory; only one of the ten Seattle B respondents and four of the Fairfax respondents reported such classes.

Participants reported their previous experience with other kinds of workshops such as human relations, group dynamics, organization development, personal growth, t-groups, sensitivity training, marathons and Gestalt encounter. Four participants from Seattle A, seven from Seattle B and four from Fairfax reported such experience.

Information was also obtained on the consulting performed by participants in the two years prior to their PETC-I training. Of the eight Seattle A respondents, one reported previous consulting experience in group process areas and three reported consulting experience in technical or subject matter areas such as curriculum design or reading.

Six of the 10 Seattle B respondents indicated process consulting and eight reported technical consulting experience. Five Fairfax participants reported technical consulting and eight reported process consulting.

Considered as a group, Seattle A participants did no consulting in the two years prior to the workshop, while Seattle B participants had done 42 consultations and Fairfax 47 consultations.

The data indicating participants' previous training, conducting and consulting experience is summarized in Table A2.

Participants' expectations were assessed by means of two items on the Background Questionnaire. One item asked participants to state in their own words what they expected from the workshop. A second item listed several skills and asked them to check whether or not they expected to learn the skill, or to check if they were not sure whether they would learn the skill.

Of the eight Seattle A participants who completed the questionnaire, one did not respond to the open-ended item and two said they were not sure what to expect. Five indicated they expected to learn how to work with small groups in helping them solve problems. For Seattle B eight of the 10 respondents gave answers that could be rephrased as learning to consult with small groups about process problems. Two thought they would gain in confidence; two mentioned gaining organizational skills; one indicated integrating previous workshop learnings and one hoped to gain in role effectiveness. In the Fairfax workshop four of the 10 respondents indicated they expected to learn to consult with groups in education. The following responses were given by one participant each: to help with my regular job, to learn how to help others problem solve, to become a change agent for the district, to experiment with change agent roles and apply organizational skills.

Table A2

Participants' Previous Training and Consulting Experience

Kind of Experience	Site			N	Total Percent
	Seattle A	Seattle B	Fairfax		
Participants Responding	8	10	10	28	
<u>Previous Experience</u>					
<u>Conducting Workshops</u>					
ITCP Workshops					
GPS (from PETC-I)	8	10	10	28	100
INF	0	1	7	8	29
IPC	0	2	8	10	36
Other Workshops	3	7	7	17	61
Average hours/participant reporting conducting workshops	39	85	-- ^a	--	--
<u>Previous Training</u>					
IPC	8	10	10	28	100
RUPS	8	10	10	28	100
INF	8	10	10	28	100
PETC-I	8	10	10	28	100
Conflict	8	10	0	18	64
Organizational Theory	6	1	4	11	39
Other	4	7	4	15	54
<u>Previous Consulting</u> (in previous two years)					
Technical	3	8	5	16	57
Group Process	0	6	8	14	50
None	5	2	1	8	29
Total number process consultations in previous two years	0	42	47	89	--

^aSeveral respondents failed to indicate the amount of time spent in conducting workshops.

The responses to the second item for assessing expectations are summarized in Table A3. This table shows the number of participants at each workshop who indicated incorrect or unclear expectations concerning

eight skill areas. Incorrect and unclear expectations were held by some participants for six of the eight skill areas. Correct expectations were held for two areas. All participants correctly assumed they would be learning to diagnose a client's problems and act as a temporary consultant to a client system.

Table A3
Number of Responses Showing
Incorrect Expectations (IE) or Unclear Expectations (UE)
for the Workshop^a

Expectation	Correct Response	Seattle A		Seattle B		Fairfax		Total		Combined Percent IE + UE
		IE	UE	IE	UE	IE	UE	IE	UE	
Solve a client system's problems	No	0	3	2	2	0	2	2	7	32%
Identify own competencies and needs	Yes	0	1	1	0	1	0	2	1	11%
Diagnose client problems	Yes	0	0	0	0	0	0	0	0	0
How groups change	Yes	0	2	1	0	1	1	2	3	18%
Become an organization development consultant	No	3	1	5	2	5	3	13	6	68%
Act as a temporary consultant to a client system	Yes	0	0	0	0	0	0	0	0	0
Conduct unstructured learning experiences	No	4	3	5	3	3	3	12	9	75%
Conduct PETC-II: Consulting Workshop	No	3	4	6	1	3	2	12	7	68%

^aNote: N=28.

An attempt is made in the workshop orientation materials to put the responsibility for change on the client; the consultant helps the client solve its problem or reach its goal. Two participants incorrectly thought they would learn to solve a client system's problem; seven were uncertain. Two participants responded incorrectly and one was uncertain about whether they would identify their own competencies and needs in the workshop. This area represents a major goal of the workshop. Another important learning goal concerns how groups change. There were two "incorrect" and three "unclear" responses for this area.

The preworkshop orientation materials also attempt to make it clear that participants of PETC-II will not learn in the workshop to become organizational development consultants, conduct unstructured learning experiences or to conduct PETC-II workshops as Senior Trainers. A fairly high proportion of participants had incorrect and unclear expectations for these three areas. Thirteen of the 28 participants incorrectly thought they would become OD consultants; six were unclear. A plausible explanation may be that participants were not distinguishing PETC-II from PETC-III which all intended to attend in the following months; their goals for the overall PETC program included becoming OD consultants. Twelve of the participants incorrectly expected to learn to conduct unstructured learning experiences; an additional nine were unclear. Thus only seven participants responded correctly concerning this expectation. Twelve participants had incorrect and seven had unclear expectations about conducting PETC-II workshops.

Clearly, some additional effort needs to be made in setting appropriate expectations for the workshop.

Clients. In Seattle, practicum client groups were recruited by the workshop installer by mailing letters to 12-educator groups and 12-citizen groups who were working with the district in human service concerns. The letter described the training program and the availability of consultants in training who could assist groups in solving process or organizational problems. Approximately three-fourths of the citizen and educator groups expressed some interest. The installer talked with these groups to further describe the program. He then met with four citizen and four educator groups to discuss expectations and make arrangements for the consulting sessions. Three groups from each

area finally served as client groups, three educator groups for Seattle A and three citizen groups for Seattle B.

In Fairfax, the installer was aware of several groups he believed would be interested in some consulting. The names of several other potential client groups were supplied by contacts in the district. The installer checked with any supervisors to which the groups were responsible and then discussed the proposal with a representative of each group. Most of the groups said they were interested and 5 were selected.

Instruments

The purpose of each instrument is presented below, along with the associated data collection, analysis, and reporting procedures.

Trainee Background Questionnaire. This questionnaire was designed to obtain biographical information and information about workshop expectations and previous consulting experience and training. It was also used to determine the extent to which the trainee sample is representative of the intended population. The instruments were administered at the workshop site by the evaluator immediately before training as a part of the preworkshop data collection activities. Participant background information and site description information was summarized in a narrative description of the participant sample and workshop.

Practicum Client Questionnaire. The practicum client questionnaire was used to assess client reactions to the consulting experience. This instrument also provided trainees with feedback from their client groups concerning the usefulness of the experience. This instrument was administered by the trainee consulting teams to their clients immediately

after the last consulting session. The evaluator provided trainees with copies of the instrument and gathered them back from trainees following the workshop. Frequency distributions and narrative summaries of comments were reported to show how helpful clients thought the consulting sessions were.

PETC-II Final Questionnaire. In general, this questionnaire was used to determine to what extent participants value the workshop experience. The instrument consists of rating scales to assess participant reaction to the training procedures and content along specified criteria. Information about workshop costs and usefulness was also obtained. This instrument was administered immediately following the workshop. Frequency distributions were obtained and summarized in narrative discussions of the perceived value of the training.

Trainer Interview Schedule. The schedule was used to obtain information from the trainers on their perceptions about (1) the extent to which the training strategies are operationally feasible and manageable, (2) the problems and issues that emerge during workshop trials, and (3) the nature of their role as trainer. This interview was conducted by the evaluator following the workshop. Narrative summaries of the trainers' responses were provided.

Workshop Installer Interview Schedule. This schedule was used to determine: (1) if procedures for obtaining client groups and communicating adequate expectations are feasible and adequate, and (2) if preworkshop orientation materials provide potential users with the information they need and give clear and correct expectations about the nature of the system. This interview took place

along with the trainer interviews following the workshop. It was conducted by the evaluator. Narrative summaries of the responses were provided.

Trainer Log. The log was used by the trainers to document adherence to the training design and to note important issues or problems that arise in the content, process or environment of the workshop. The log was maintained by the trainers as they completed training session. The log was analyzed for significant departures from the expected training design and important issues or problems arising during the workshop. Both kinds of information were provided through narrative summaries.

Results

In this section, the results of the workshop evaluations are presented. First the participant evaluations are presented summarizing data from the final questionnaire. This is followed by practicum clients' evaluations, a summary of the practicum client questionnaire data. Finally, the installers' and trainers' evaluations are presented, summarizing the installer and trainer interview schedules and trainer logs.

Participants' Evaluation

A final questionnaire was administered at the end of the training to determine trainee attitudes toward the workshop. Questionnaire data was collected from all of those completing the training.

Ratings of Workshop Goals and Objectives. Participants were asked to rate the clarity and the significance of the workshop goals and objectives. The mode response and the range for the total responses are included in Table A4. Both the clarity and significance of the goals and objectives were rated positively by the participants.

Table A4

Participant Ratings of Workshop
Goals and Objectives

Criteria	Site	Response Options					N	$\bar{X}$
		Unsatisfactory	Needs Improvement	Satisfactory	Good	Excellent		
Clarity	Seattle A	0	0	1	7	1	9	4.00
	Seattle B	0	0	0	6	3	9	4.33
	Fairfax	0	0	0	4	6	10	4.50
	Total	0	0	1	17	10	28	4.32
Significance/ Importance	Seattle A	0	0	0	3	6	9	4.67
	Seattle B	0	0	0	4	5	9	4.56
	Fairfax	0	0	0	4	6	10	4.60
	Total	0	0	0	11	17	28	4.61

Ratings of the Workshop Methods, Strategies and Procedures. Overall, the participants rated the workshop methods, strategies and procedures as "good." Table A5 includes the modes and ranges of the three questions used to obtain participant perceptions of the workshop methods. All of the participants felt the workshop methods were appropriate and useful for learning consulting skills. It should be noted that the Fairfax participants were less satisfied with the use of time than the Seattle A and Seattle B participants.

Table A5

Participant Ratings of the Workshop
Methods, Strategies and Procedures

Criteria	Site	Response Options					N	$\bar{X}$
		Unsatisfactory	Needs Improvement	Satisfactory	Good	Excellent		
Appropriateness for learning to be a consultant	Seattle A	0	0	0	5	4	9	4.44
	Seattle B	0	0	0	8	1	9	4.11
	Fairfax	0	0	0	5	5	10	4.50
	Total	0	0	0	18	10	28	4.36
Practical usefulness in learning consulting skills	Seattle A	0	0	1	5	3	9	4.22
	Seattle B	0	0	0	6	3	9	4.33
	Fairfax	0	0	1	4	5	10	4.40
	Total	0	0	2	15	11	28	4.32
Efficient use of time	Seattle A	0	0	1	7	1	9	4.00
	Seattle B	0	0	0	6	3	9	4.33
	Fairfax	0	2	3	5	0	10	3.30
	Total	0	2	4	18	4	28	3.86

Workshop Content. The participants rated the workshop content on five dimensions: appropriateness, relevance, clarity, parsimony and practical significance. The results are presented in Table A6. None of the participants rated the workshop content below satisfactory on any of the five dimensions, with the mode response on clarity, parsimony and practical significance rated good. The mode response was excellent for appropriateness and relevance of content.

Table A6
Participant Ratings of Workshop Content

Criteria	Site	Response Options					N	$\bar{X}$
		Unsatisfactory	Needs Improvement	Satisfactory	Good	Excellent		
Appropriateness for your experience and understanding	Seattle A	0	0	0	5	4	9	4.44
	Seattle B	0	0	0	4	5	9	4.56
	Fairfax	0	0	0	4	6	10	4.60
	Total	0	0	0	13	15	28	4.54
Relevance for learning to be a consultant	Seattle A	0	0	0	3	6	9	4.67
	Seattle B	0	0	0	1	8	9	4.89
	Fairfax	0	0	0	4	6	10	4.60
	Total	0	0	0	8	20	20	4.71
Clarity of presentation and definition	Seattle A	0	0	1	7	1	9	4.00
	Seattle B	0	0	1	4	4	9	4.33
	Fairfax	0	0	0	6	4	10	4.40
	Total	0	0	2	17	9	28	4.25
Parsimony (little or no unimportant or not useful materials)	Seattle A	0	0	2	7	0	9	3.78
	Seattle B	0	0	0	5	4	9	4.44
	Fairfax	0	0	1	6	3	10	4.20
	Total	0	0	3	18	7	28	4.14
Practical significance for successful consulting	Seattle A	0	0	0	6	3	9	4.33
	Seattle B	0	0	0	5	4	9	4.44
	Fairfax	0	1	0	3	6	10	4.40
	Total	0	1	0	14	13	28	4.39

Relevance and Utility of Content. A set of general questions were asked regarding the system's relevance and utility. The results are presented in Tables A7 and A8. The relevance of the system's content was rated highly to the criteria of offering new insights and speaking to vital issues.

Table A7

Participant Responses Regarding Relevance of System's Content

Response	Site	Response Option						N	$\bar{X}$
		Low 1	2	3	4	5	High 6		
Offered new insights, ways of viewing problems vs.	Seattle A	0	0	1	3	4	1	9	4.56
	Seattle B	0	1	0	0	6	2	9	4.89
	Fairfax	0	0	0	0	8	2	10	5.20
Restated what I already knew	Total	0	1	1	3	18	5	28	4.89
Spoke to vital issues, concerns vs.	Seattle A	0	2	1	0	4	2	9	4.33
	Seattle B	0	0	0	1	6	2	9	5.11
	Fairfax	0	2	2	0	2	4	10	4.40
Missed vital issues	Total	0	4	3	1	12	8	28	4.61

Table A8

Participant Responses Regarding Utility of System's Content

Response	Site	Response Option						N	$\bar{X}$
		Low 1	2	3	4	5	High 6		
Ideas, skills can be used immediately vs.	Seattle A	0	0	1	0	6	2	9	5.00
	Seattle B	0	0	0	1	2	6	9	5.56
	Fairfax	0	0	2	1	4	3	10	4.80
Use requires changes over which I have no control	Total	0	0	3	2	12	11	28	5.11
Provided practical "how to" help vs.	Seattle A	0	0	1	1	6	1	9	4.78
	Seattle B	0	1	0	0	7	1	9	4.78
	Fairfax	0	1	1	1	4	3	10	4.70
Provided little practical help	Total	0	2	2	2	17	5	28	4.75
Plan extensive use of ideas/skills materials vs.	Seattle A	0	0	0	0	7	2	9	5.22
	Seattle B	0	0	0	1	4	4	9	5.33
	Fairfax	0	0	0	1	5	4	10	5.30
Plan not to use at all	Total	0	0	0	2	16	10	28	5.29
Low potential for organizational improvement vs.	Seattle A	0	0	0	1	4	4	9	5.33
	Seattle B	0	0	0	1	3	5	9	5.44
	Fairfax	1	0	0	0	2	7	10	5.30
High potential	Total	1	0	0	2	9	16	28	5.36

Participants thought the content of the system was useful to them with a mode response for the eight questions of 5 and 6. Each question was answered on a 6-point anchored rating scale with 1 the negative end of the scale, and 6 the positive end. All of the trainees indicated that they planned to use the ideas, skills and materials presented in the workshop; with ten of the twenty-eight trainees planning extensive use of the system's content. A followup question was asked to assess how the trainees plan to use the training. As is indicated in Table A9, eleven trainees will utilize consulting skills in their present job. The training will open up new consulting possibilities for eight of the trainees, and four of the trainees indicated plans to use the training materials. Four trainees gave some other response.

Table A9

Participant Responses Regarding Future Value of the Training

Response	Number of Responses			Total
	Seattle A	Seattle B	Fairfax	
Will utilize skills on my present job	3	5	3	11
Training will open up new consulting possibilities	3	2	3	8
Plan use of workshop materials	1	1	2	4
Other	2	1	1	4

The participants were asked if they will have an opportunity to do process consulting. The results are presented in Table A10. Twenty-one of the twenty-seven respondents indicated that they planned to do process consulting. The other six were uncertain as to whether they would consult. Of these six, three indicated that their job role did not include

consulting responsibilities or that their school district was not supportive of their consulting. None of the participants indicated that they would not consult.

Table A10

Participants' Responses Concerning Whether They Will Have an Opportunity to do Process Consulting

Response	Number of Responses			Total
	Seattle A	Seattle B	Fairfax	
Yes	6	8	7	21
Uncertain	2	1	3	6
No	0	0	0	0

The conceptual framework of the PETC-II system is based on the differential diagnostic matrix, the differential intervention matrix and the phases of planned change. Issues were raised during the interim evaluation as to the clarity and utility of the matrices. In order to determine whether participants had problems with these matrices, their perceptions of the clarity and utility of the matrices and phases of planned change were collected. The participants rated the differential diagnostic matrix and differential intervention matrix positively for all variables measured. The phases of planned change were also rated positively by the participants. The results are presented in Tables A11, A12 and A13.

Overall, the relevance and utility of the system's content was rated highly.

Quality of Materials, Activities and Structure. A series of questions were asked to assess the participants' judgment of the quality of the materials. The questions were answered on a 6-point anchored

Table All

Participant Ratings of the Helpfulness and
Usefulness of the Differential Diagnostic Matrix

Criteria	Site	Response Options				N	$\bar{X}$
		Strongly Disagree	Disagree	Agree	Strongly Agree		
Useful for labeling; communicating with consulting team	Seattle A	1	1	6	1	9	2.78
	Seattle B	0	0	5	4	9	3.44
	Fairfax	0	0	1	9	10	3.90
	Total	1	1	12	14	28	3.39
Distracted and confused me with concepts and issues unrelated to my client's problem	Seattle A	2	4	3	0	9	2.89
	Seattle B	4	4	1	0	9	3.33
	Fairfax	8	2	0	0	10	3.80
	Total	14	10	4	0	28	3.36
Helpful in understanding my client's problem	Seattle A	0	2	5	2	9	3.00
	Seattle B	0	0	4	5	9	3.56
	Fairfax	0	0	2	8	10	3.80
	Total	0	2	11	15	28	3.46
Kept me from really focusing on my client's real problems and their causes	Seattle A	3	6	0	0	9	3.33
	Seattle B	4	5	0	0	9	3.44
	Fairfax	6	2	0	2	10	3.20
	Total	13	13	0	2	28	3.32
My own instincts and observations of the client's problems were more useful than the matrix	Seattle A	0	4	4	1	9	2.33
	Seattle B	0	7	2	0	9	2.78
	Fairfax	5	4	1	0	10	3.40
	Total	5	15	7	1	28	2.66
The difference between functions and operational characteristics is not clear	Seattle A	3	5	1	0	9	3.22
	Seattle B	1	6	2	0	9	2.89
	Fairfax	8	1	1	0	10	3.70
	Total	12	12	4	0	28	3.29
I don't understand the term/concept "operational characteristic"	Seattle A	3	5	1	0	9	3.22
	Seattle B	3	6	0	0	9	3.33
	Fairfax	7	2	1	0	10	3.60
	Total	13	13	2	0	28	3.39
The matrix provides a useful way of focusing on a group problem	Seattle A	0	1	6	2	9	3.11
	Seattle B	0	1	5	3	9	3.22
	Fairfax	0	0	2	8	10	3.80
	Total	0	2	13	13	28	3.39

Table A12

Participant Ratings of the Helpfulness and
Usefulness of the Differential Intervention Matrix

Criteria	Site	Response Options				N	$\bar{X}$
		Strongly Disagree	Disagree	Agree	Strongly Agree		
Provides a good check- list of possible procedures and roles	Seattle A	0	0	6	3	9	3.33
	Seattle B	0	0	3	6	9	3.67
	Fairfax	0	0	1	9	10	3.90
	Total	0	0	10	18	28	3.64
The process for design dimension of the matrix was not useful	Seattle A	1	7	1	0	9	3.00
	Seattle B	2	7	0	0	9	3.22
	Fairfax	7	3	0	0	10	3.70
	Total	10	17	1	0	28	3.32
It makes more sense to look at the client's problems and goals; then design an appro- priate strategy without the matrix	Seattle A	0	8	1	0	9	2.89
	Seattle B	2	7	0	0	9	3.22
	Fairfax	8	2	0	0	10	3.80
	Total	10	17	1	0	28	3.32
The matrix was helpful in deciding what to do to help the client	Seattle A	0	2	5	2	9	3.00
	Seattle B	0	1	5	3	9	3.22
	Fairfax	0	0	3	7	10	3.70
	Total	0	3	13	12	28	3.32

Table A13

Participant Ratings of the Helpfulness and
Usefulness of the Phases of Planned Change

Criteria	Site	Response Options				N	$\bar{X}$
		Strongly Disagree	Disagree	Agree	Strongly Agree		
Helped me keep impor- tant consulting issues in mind as I worked with my client	Seattle A	0	0	6	3	9	3.33
	Seattle B	0	0	6	3	9	3.33
	Fairfax	0	0	7	8	10	3.80
	Total	0	0	14	14	28	3.50
Helped me organize my consulting activities	Seattle A	0	0	7	2	9	3.22
	Seattle B	0	0	6	3	9	3.33
	Fairfax	0	0	2	8	10	3.80
	Total	0	0	15	13	28	3.46
Confused me with too many things to keep track of	Seattle A	2	6	1	0	9	3.11
	Seattle B	2	7	0	0	9	3.22
	Fairfax	8	2	0	0	10	3.80
	Total	12	15	1	0	28	3.39
Provided too rigid a process for consulting; the world doesn't fit into such a mold	Seattle A	1	7	1	0	9	3.00
	Seattle B	2	7	0	0	9	3.22
	Fairfax	8	2	0	0	10	3.50
	Total	11	16	1	0	28	3.36

rating scale with 1 the low end of the scale and 6 the high end. Table A14 includes the mode response and the range for each question. The mode response was 5 for the clarity and interest of the materials with a range of 2 to 6. The value of the exercises was rated highly with a mode of 5 and a range of 3 to 6. The usefulness of the structure also had a mode of 5 and a range of 3 to 6. The originality of the materials had a mode of 5 and a range of 3 to 6 indicating that most participants felt the materials demanded original thinking. Once again, Fairfax participants were less satisfied than Seattle A and Seattle B participants with the use of session time. The structure was rated highly as to allowing time for reflection and personal growth with a mode of 6 and a range of 4 to 6. All of the participants indicated that they'd gained new insights into their own style of consulting.

Information about the participant ratings of the preworkshop orientation materials and activities was collected. As is indicated in Table A15, the orientation materials were rated as "good" in providing the information needed, and as "satisfactory" in giving clear and correct expectations.

Workshop Satisfaction. Participants were asked a series of questions relating to general workshop satisfaction and satisfaction with the consulting practicum. The results of these questions are found in Tables A16-A21.

Overall, participants were highly satisfied with the workshop. The mode responses on four general indicators of workshop satisfaction are reported in Table A16. Seven of the nine participants at Seattle A though the workshop was worthwhile. All Seattle B and Fairfax participants rated the workshop as being worthwhile. Participants were

Table A14

Participant Responses Regarding the Quality
and Efficacy of Materials, Activities and Structure

Response	Site	Response Options						N	$\bar{X}$
		Low 1	2	3	4	5	High 6		
Materials clear, understandable vs. Materials full of jargon	Seattle A	0	0	2	4	3	0	9	4.11
	Seattle B	0	1	0	2	4	2	9	4.67
	Fairfax	0	0	1	3	4	2	10	4.70
	Total	0	1	3	9	11	4	28	4.50
Materials main- tained interest vs. Materials failed to interest	Seattle A	0	0	2	1	4	2	9	4.67
	Seattle B	0	1	0	0	4	4	9	5.11
	Fairfax	0	1	0	0	6	3	10	5.00
	Total	0	2	2	1	14	9	28	4.93
Practice exercises of great value vs. Little or no value	Seattle A	0	0	1	2	2	4	9	5.00
	Seattle B	0	0	0	0	8	1	9	5.11
	Fairfax	0	0	0	1	6	3	10	5.20
	Total	0	0	1	3	16	8	28	5.11
Structure useful, promotes learning vs. Too structured, blocked learning	Seattle A	0	0	1	1	3	4	9	5.11
	Seattle B	0	0	0	0	4	5	9	5.56
	Fairfax	0	0	0	1	6	3	10	5.20
	Total	0	0	1	2	13	12	28	5.29
Demanded much ori- ginal thinking vs. Demanded no original thinking	Seattle A	0	0	0	5	3	1	9	4.56
	Seattle B	0	0	0	1	4	4	9	5.33
	Fairfax	0	0	1	2	5	2	10	4.80
	Total	0	0	1	8	12	7	28	4.89
Session time well used vs. Wasted session time	Seattle A	0	0	0	1	4	4	9	5.33
	Seattle B	0	0	0	0	5	4	9	5.44
	Fairfax	0	1	2	5	2	0	10	3.80
	Total	0	1	2	5	11	8	28	4.82
Allowed time for reflection and per- sonal growth vs. Did not allow time	Seattle A	0	0	0	2	3	4	9	5.22
	Seattle B	0	0	0	1	3	5	9	5.44
	Fairfax	0	0	0	1	4	5	10	5.40
	Total	0	0	0	4	10	14	28	5.36
Gained new insights about my style of consulting vs. Learned nothing new about my style	Seattle A	0	0	0	1	4	4	9	5.33
	Seattle B	0	0	0	2	4	3	9	5.11
	Fairfax	0	0	0	1	6	3	10	5.20
	Total	0	0	0	4	14	10	28	5.21

Table A15

Participant Ratings of the Preworkshop
Orientation Materials and Activities

Criteria	Site	Response Options					N	$\bar{X}$
		Unsatisfactory	Needs Improvement	Satisfactory	Good	Excellent		
How successfully they provided you with information you needed	Seattle A	0	1	3	5	0	9	3.44
	Seattle B	0	1	3	3	2	9	3.67
	Fairfax	0	2	2	5	1	10	3.50
	Total	0	4	8	13	3	28	3.54
How successfully they gave you clear and correct expectations about the nature of the workshop	Seattle A	0	2	4	2	1	9	3.22
	Seattle B	0	1	5	3	0	9	3.22
	Fairfax	0	2	2	3	3	10	3.70
	Total	0	5	11	8	4	28	3.39

Table A16

Participant Responses to General Indicators
of Satisfaction with the Workshop

Response	Site	Response Options						N	$\bar{X}$
		Low 1	2	3	4	5	High 6		
Workshop not very worthwhile vs. Extremely worthwhile	Seattle A	1	1	0	0	3	4	9	4.67
	Seattle B	0	0	0	0	0	9	9	6.00
	Fairfax	0	0	0	0	4	6	10	5.60
	Total	1	1	0	0	7	19	28	5.43
Workshop has not come up to my expectations vs. Has exceeded my expectations	Seattle A	0	0	0	1	7	1	9	5.00
	Seattle B	0	0	0	0	7	2	9	5.22
	Fairfax	0	1	0	1	6	2	10	4.80
	Total	0	1	0	2	20	5	28	5.00
Consulting practicum was extremely valuable, learned much vs. Little value and learning	Seattle A	0	1	0	0	2	6	9	5.33
	Seattle B	0	0	0	1	2	6	9	5.56
	Fairfax	0	0	0	0	2	8	10	5.80
	Total	0	1	0	1	6	20	28	5.57
Compares very low to other professional education courses vs. Compares very high	Seattle A	0	0	0	1	3	5	9	5.44
	Seattle B	0	0	0	1	1	7	9	5.67
	Fairfax	0	0	0	0	2	8	10	5.80
	Total	0	0	0	2	6	20	28	5.64

asked if the workshop met their expectations. The mode response was 5 on a 6-point anchored scale, with 6 being high, indicating that the workshop met or exceeded their expectations. Two followup questions were asked to determine what factors contributed to the participants' evaluation of the workshop. The combined and categorized responses appear in Table A17.

Table A17

Factors Contributing to Participants'
Evaluation of the Workshop

Factor	Number of Responses			Total
	Seattle A	Seattle B	Fairfax	
Provided an understanding of consulting theory, concepts, cognitive learning	5	8	5	18
Provided practical experience in consulting with real client, opportunity to practice	9	2	5	16
Increased confidence and motivation as a consultant	6	5	2	13
Provided personal learnings, insights, goals, strengths, weaknesses	2	3	3	8
Good teamwork, social interaction	4	3	1	8
Provided feedback on consulting ability	5	2	0	7
Developed or reinforced consulting skills, changes in behavior, abilities	3	3	0	6
Positive evaluation of trainers	2	1	2	5
General positive comments	0	2	2	4
Provided integration of past workshops, skills	2	1	1	4
Exhausting experience	1	0	1	2

The participants rated the workshop highly when compared to other professional education courses.

As is indicated in Table A18, twenty-four of the twenty-six respondents felt the costs in time and money were small for the outcomes; two respondents felt the costs were about right for the outcomes.

Table A18

Participants' Judgments of the Value of the Training
Compared to Costs in Time and Money

Site	Response			
	Costs Small For Outcome	Costs Right For Outcome	Costs Great For Outcome	No Response
Seattle A	9	0	0	0
Seattle B	9	0	0	0
Fairfax	6	2	0	2
Total	24	2	0	2

Participants were asked a series of questions relating to the consulting practicum. As is shown in Table A16, the participants indicated that the consulting practicum was valuable with a mode response of 6 and a range of 2 to 6. Participants were asked what factors contributed to their assessment of the consulting practicum. The categorized responses are shown in Table A19. Nine respondents indicated that the practicum provided a real consulting experience. Six respondents listed the opportunity to practice consulting skills. Five respondents indicated that they had increased confidence and five respondents experienced successful consultation with client. One of the respondents gave a negative response indicating a lack of success with the client group.

Table A19

Factors Contributing to the Participants'
Assessment of the Consulting Practicum

Factor	Number of Responses			Total
	Seattle A	Seattle B	Fairfax	
Practicum provided a real consulting experience	3	4	2	9
Provided an opportunity to practice consulting skills	3	2	1	6
Increased confidence	2	1	2	5
Experienced successful consultation with client	0	1	4	5
Enjoyed working as a member of a consulting team	0	1	0	1
Lack of success with client group	1	0	0	1

One respondent enjoyed working as a member of a consulting team. Participants were asked to list the specific learnings for them and problems encountered as a result of the consulting practicum. Table A20 includes the categorized responses. Twenty-two of the responses related to the learning of PETC skills. Seventeen of the responses related to learning more general concepts of group dynamics. Eight responses related to learning about the role of the consultant; seven mentioned learning how to work as a member of a consulting team and six listed increased confidence in their consulting skills and learning about the entry building process. Two participants gave some other response. Table A21 includes the categorized responses to the problems encountered in the consulting practicum. Eight responses related to difficulties in getting the client group to deal with the problem; seven responses mentioned problems in scheduling the practicum meeting times; seven mentioned problems in

Table A20

Specific Learnings Made as a
Result of Your Consulting Experience

Response	Number of Responses			Total
	Seattle A	Seattle B	Fairfax	
Increased knowledge of PETC skills	5	9	8	22
Learned general concepts of group dynamics	6	7	4	17
Increased knowledge and awareness of the role of consultant	1	5	2	8
Learning how to work as a member of a consulting team	2	1	4	7
Increased knowledge of entry building skills	1	4	1	6
Increased confidence in my consulting skills	1	1	4	6
Other	0	2	0	2

working with others as a member of a consulting team. Four responses related to misunderstanding of the consultant's role. Fifteen responses related to some other problem that was encountered.

Potential of PETC-II for Meeting an Educational Need. Participants were asked about the need for educators with process consulting abilities and the potential of PETC-II for meeting such an educational need. The results are presented in Tables A22 and A23. Sixteen of the twenty-eight participants thought PETC-II had an excellent potential for meeting an educational need. Ten thought potential of PETC-II was good and two rated it as fair.

Table A21

Problems Encountered
in the Consulting Practicum

Problem Encountered	Number of Responses			Total
	Seattle A	Seattle B	Fairfax	
Getting client group to deal with problem	5	0	3	8
Problems in scheduling practicum meeting times	1	4	2	7
Problems in working as a consulting team	4	0	3	7
Misunderstanding of consultant's role	1	3	0	4
Clients weren't really a group	2	0	0	2
Dealing with school crisis instead of defined problem	0	0	2	2
Problems because of previous contact with client system	0	0	2	2
Problems in dealing with sensitivity (training) issues	0	2	0	2
Increased awareness of need for adjusting techniques to fit the client group	0	0	1	1
Developing a plan of action for the client	0	1	0	1
Helping the client see the need for attention to group process	0	1	0	1
Lack of agreement between client and consultant as to problem	1	0	0	1
Took more time than expected to build trust	0	0	1	1
Poor setting	1	0	0	1
No problems	0	1	0	1

Table A22

Participants' Perceptions of the Need for
Educators with Process Consulting Abilities

Site	Response				
	Definitely Strong Need	Probably Some Need	Probably Not Much Need	Definitely No Need	No Opinion
Seattle A	6	3	0	0	0
Seattle B	8	1	0	0	0
Fairfax	10	0	0	0	0
Total	24	4	0	0	0

Table A23

Participants' Ratings of the Potential of PETC-II
for Meeting an Educational Need

Site	Response				
	Excellent	Good	Fair	Poor	None
Seattle A	4	3	2	0	0
Seattle B	5	4	0	0	0
Fairfax	7	3	0	0	0
Total	16	10	2	0	0

Participant Discussion of Training Strengths and Weaknesses. At the end of the training, in addition to completing the Final Questionnaire, the participants verbally discussed the workshop strengths and weaknesses. It was felt that this would give the participants the opportunity to make any additional comments that were not reflected on the questionnaire. The total list of comments has been included to provide a complete description of the likes, dislikes, and recommendations. These appear on pages 90-96.

Twenty-six of the twenty-eight participants made a comment as to the workshop strengths. The summarized and categorized responses are included in Table A24. Six participants thought that helpful concepts were presented; four participants mentioned enjoying the debriefing sessions; four participants felt the strength of the workshop centered on the opportunity provided to work with a client group. The use of consulting groups for the practicum and the strong teamwork of the group was mentioned as a positive factor by four of the participants. Two participants responded in each of the following categories: good trainers; provided integration of past training; progress made and changes made in behavior by trainees and the use of workshop time.

Table A24
Factors Participants Liked
About the Workshop

Factor	Number of Responses			
	Seattle A	Seattle B	Fairfax	Total
Helpful concepts were presented	1	1	4	6
Debriefing session was useful	0	1	3	4
Provided opportunity to work with a real client group	4	0	0	4
Use of consulting groups in the practicum; the teamwork	1	1	2	4
Good trainers	1	0	1	2
Provided integration of past training	1	1	0	2
Progress made and behavior changes made by trainees	1	0	1	2
Use of workshop time	1	1	0	2

The participants' recommendations for improvement of the workshop are included in Table A25. Twelve of the twenty-six participants wanted additional material on some aspect of the training. The area needing more materials was varied with no single area emerging as needing additional materials. Six participants think changes should be made in the workshop schedule and two participants felt the materials should be distributed prior to the training to allow more time for reading them. Some other response was given by six of the respondents.

Table A25
Participants' Recommendations
For Improvement of the Workshop

Recommendation	Number of Responses			
	Seattle A	Seattle B	Fairfax	Total
Would like additional materials on some aspect of the training	3	6	3	12
Would like a change made in the workshop schedule	2	1	3	6
Materials should be distributed before the workshop	0	0	2	2
Other	2	2	2	6

Participants' categorized responses as to workshop weaknesses are presented in Table A26. Seven of the eighteen respondents mentioned the differential diagnostic matrix on the differential intervention matrix as a factor they disliked about the workshop. Three participants mentioned problems they had with the practicum; two persons disliked the amount of self-emphasis and the debriefing and one person felt there was too much dependence on the RUPS model for problem solving. It was felt that alternative models should have been presented.

Table A26

Factors Participants Disliked
About the Workshop

Factor	Number of Responses			
	Seattle A	Seattle B	Fairfax	Total
Disliked matrices (DIM, DDM)	1	6	0	7
Physical setting or workshop schedule was disliked	1	2	2	5
Problems with practicum	2	1	0	3
Disliked the amount of self-emphasis and the debriefing	0	0	2	2
Too much dependence on the RUPS model	0	1	0	1

What Participants Liked
About the Workshop

Seattle A

The workshop provided a chance to work with real client groups and explore my own consulting abilities; it provided a chance to experiment with being a consultant.

I liked the opportunity to practice being a consultant and a client during the role playing activities.

I felt good about the job we did with our client and especially liked that part of the workshop.

Our teamwork was good and we learned a lot from each other.

I had expected to come out a polished capable consultant but didn't--but I feel I made as much progress as possible given where I am.

The trainers were extremely helpful, I really liked them.

This workshop was very helpful in pulling together all of the other workshops.

Using the group process skills and consulting skills in front of a real client group was very helpful.

I liked the time pressure to make us work efficiently and to keep us on task.

The design gave us practical tools to use.

Seattle B

The workshop helped everything from past workshops come together--a good integration of past training.

The timing and sequence of activities was better for PETC-I than past workshops.

It helped me clarify the distinction of functions and processes.

I liked the amount of time there was to learn from each other, and the integration sessions at the end of the workshop.

I liked the practical application of applying the processes in work with a real client group.

Fairfax

I think the preplanning before we went in as consultants was excellent. I felt very secure and I think primarily it was because of the steps we went through before we went into the client group.

I liked the context of the debriefing because it gave you a broader opportunity to learn other's interventions, other's techniques and how other people use the situation.

Probably the debriefing that occurs is as close to the ideal as possible even though you may not feel like doing it. Maybe your reactions are more valid and you don't get a chance to cover them up as you might in a day. It might help to clarify some things for yourself.

I liked the matrices.

I think the most valuable time I personally had was in some of the simulations during the second and third day--looking at those matrices and the phases and going through whole kinds of mind changes that you've gotta imagine what the client thinks it's gonna be like, testing it out on somebody else in your group.

The debriefing with our trainers during the consulting practicum was extremely valuable, very helpful. It helped give us more direction: are we thinking through this properly, are we on the right track.

I think the people I've talked to this week all agree that we have made changes in our behavior as a result of the various programs, that things are beginning to fall into place.

The biggest thing that's happened to me in this program in the last three days was that, as a group, we were talking with each other about what we are doing and where we are going from here, and that as a group, we can really effect some changes. That wasn't our task but that was what's happening; I see that as a very valuable thing that has happened to us as a group.

I think we're meeting our own needs because now we have a process where we can work rather easily together.

Paper 36, "Diagnoses of Client Issues" is probably the most helpful thing next to the matrices themselves.

Our trainers were good. They were nice guys, but they were also extremely helpful. All three of us came out of our meeting with the trainers in between our first and second intervention with the client and the first thing each of us

mentioned is that it was a really helpful meeting. We went in there with a lot of confusion as to what direction we were going and I think the thing that amazed me was they really pulled out of us what direction we should go. They didn't make many direct kinds of statements that you should do this, you should do that, but they pulled it out of us, and I thought the skills they used there were really, really top flight.

What Participants Recommended for Improving the Workshop

Seattle A

I would like to see another round of role playing as a consultant and as a client.

Instead of three days of theory and simulation, three days of practicum and three days of integration and evaluation, consider having a 4/3/2 split.

I would like to have had more direct demonstrations of how to use the matrix by the trainers.

We only used one case study of the three in the book and felt the others would have been helpful.

I would like to see one more day of preparation before the three day practicum, but don't drop one of the three days after--I like the wind-down.

I would like a video-taping of our entry with the client group--it was a fantastic learning opportunity.

It would be helpful to design the client work so that feedback to team members from each other was built into the activities.

Seattle B

I would have liked a little more group dynamics information and research.

You should make the resource materials in the integration sessions for sale.

It would be helpful to have a resource book of interventions; I wanted to increase my repertoire of interventions.

Perhaps we could start with a smaller matrix and then build our own.

It would be helpful to have some key questions and strategies for diagnosing a clients' problem.

A collection of entry level interventions (as in PETC-I) would be helpful.

The Universal Traveler would have been good as an earlier resource.

It should be clearer that initial data gathering is also an intervention and needs the same planning and preparation as other interventions.

I would like more integration at the beginning with teaching strategies for particular topics or problems.

I would have liked more help in reading client affect.

Fairfax

The debriefing was very valuable but was a natural let down after the intensity of what we had been through--working with the clients--and I think there was a certain amount of exhaustion. Maybe there could have been a day or so in between before we did that kind of debriefing.

Some of the activities had too much time allotted for them. Maybe we were not approaching the task intensely enough, but it seemed as though we finished way before the time was over and we were ready to move on to something else.

I think I would have been a little more comfortable had we gotten some of the reading materials a few days prior to beginning of the workshop and then gone over them again in the sessions. All the material was new and presented as new in the sessions, and it was push, push, push to read it all, especially Paper 9 (the central ideas paper).

I would have liked to experience more intervention techniques and a variety of ways to collect data so that we don't think in a box and continue to repeat what we are used to.

I think we're getting a really valuable and also heavy theoretical component. If we had more time to digest that part of it ahead of time so the first three days could be spent interacting on the ideas in the papers and in working with each other as clients and consultants, we would be more ready when we went out in the field. I think we were still wrestling in the field for three days digesting the theoretical part and the models and the structure.

I wonder if the survey of the literature should come in the first part of the program so that material that you glean from the books can be applied to the consulting situation, because I don't know when I'll be involved in another situation just exactly like this. Yesterday in pursuing the literature I really picked up a lot of things that I feel would have been helpful and my teammate lifted out of the literature a whole approach that would have been very, very valuable for us to have used, but it was an after the fact.

I would have liked to utilize some of that debriefing time to work with at least one other client group so I had a little better perspective of the interaction.

The confidentiality of some of the data that you bring back in these kinds of exercises could be dynamite if misused, and I don't think any place that I see anything that related to consultants' maintaining confidentiality of client information. I think that's very important in terms of this Buckley thing, confidentiality of records, etc. That should also be made very clear to the client group, that any interaction, any surfacing of problems or concerns are not going to be brought back to the group.

Might be some consideration given to additional information on pitfalls--like being too quick to make assumptions about data or trying to diagnose after your first meeting--too many things you don't know and you make a lot of false assumptions.

Could have expanded on the case studies and involved us more. None of us, I think, felt after reading that little case study there was much there that we could react to, and there was disagreement there because the information was rather vague, there just wasn't enough there.

↓ What Participants Disliked
About the Workshop

Seattle A

Regarding the practicum consultations, there was poor selection of client groups and the orientation and setting of expectations for above client groups and consultants was very confusing.

I was not able to use the matrix.

It was unforgivable to mix up the dates for our practicum client work; it made us less believable to them.

There gets to be too much to do during the preparation for the consulting sessions and not enough of the resource papers and checklists are used for all three consulting sessions during the practicum.

Seattle B

We wanted more information about our client groups at an earlier time in the workshop.

I disliked being tied up in the workshop for so much time in one block.

I disliked the meeting facilities for the workshop.

I didn't find the matrices (Differential Diagnostic Matrix, Differential Intervention Matrix) very helpful; perhaps I needed more time with them.

There needed to be more rationale given--especially for the functional relationships with the dimensions of the matrices.

It seemed the client was boxed in by the matrices.

We needed a step by step case study of how a matrix diagnosis is made with a particular client with a rationale for why that particular diagnosis.

I needed more help in how to link the two matrices.

I needed more help in learning the language of the matrices; the materials assumed we knew some things I didn't know.

We depend on the RUPS model as the only way diagnosis.

Fairfax

I didn't mind the one weekend, but two weekends in a row are very difficult, in terms of our own energy and going back to our own offices. That's a very difficult situation for many of us who have family needs.

I felt kind of burned out after nine days. Today and yesterday seemed rather strange--some of us didn't feel like we were involved enough in the debriefing, but it's because we were tired, I think.

There was an awful lot of unstructured and repetitive debriefing.

I'd like to pick up on this self-emphasis thing. I think one of our participants said, "If I look at myself one more time, I'm gonna throw up." I really felt strongly that way, I felt myself getting very hostile, I didn't care whether I talked or not; it got too long.

Practicum Client's Evaluations

The Practicum Client Questionnaire was designed to assess the client perceptions of the consulting experience. This instrument also provides trainees with feedback from their client groups concerning the perceived usefulness of the experience. The questionnaires were administered by the trainee consulting teams to the clients immediately after the last consulting session. The size of client group ranged from one to twelve. Due to the variance in the size of client groups, some consulting teams are more heavily represented in the data than others. The data from the Seattle B site has been misplaced. This report includes only the responses from the Seattle A and Fairfax practicum clients.

The client expectations for the consultation sessions are presented in Table A27. The most frequently given expectations are that the

sessions will include problem solving and communication skill activities, result in solutions to problems and lead to a better understanding of the group.

Table A27

Respondents' Expectations for the Consultation Sessions

Response ^a	Number of Responses
Problem Solving Activities	8
Solutions to Problems	5
Communication Skill Activities	4
Better Understanding of This Group	4
No Expectations	3
Improvement of Group Process	2
Techniques for Interacting With Supervisors	2
Improvement of Meetings	1
Time For Sharing	1
Leadership Skills	1
Human Relations	1
Sessions Will Be Below Average	1
Same as Results	1

^aQuestion 1: What were your expectations for the consultation sessions?

The client satisfaction with the experience is reported in Table A28. All of the respondents indicated satisfaction, with 23 of the 42 "very pleased" with the consulting experience. The clients were asked to specify what did or did not happen in the consultation that affected their evaluation. The results are presented in Table A29. Nearly half of the respondents mentioned problem solving activities or the exploration and sharing of feelings as contributing to their evaluation.

Table A28

Respondents' Satisfaction With the
Consultation Experience^a

Site	Response Options						$\bar{X}$	SD
	Very Disappointed 1	2	3	4	5	Very Pleased 6		
Seattle A	0	0	1	2	7	9	5.26	.87
Fairfax	0	0	0	3	6	14	5.47	.73
Total	0	0	1	5	13	23	5.38	.79

^aQuestion 2a: How did you feel about the whole experience?

Table A29

Factors That Contributed to Respondents'
Evaluation of the Consulting Experience

Factors ^a	Number of Responses
Problem Solving Activities	10
Sharing, Exploring Feelings	9
Positive Outcomes of the Consultation	5
Open Atmosphere	3
Activities Centered Around Our Goals	3
Pleased With Efforts of Consultation Team	3
Group Strength at End	2
Improved Communication Skills	2
Didn't Deal With Conflict	1
(Respondent) Didn't Get Actively Involved Until Last Day	1

^aQuestion 2b: What did or did not happen to make you feel that way?

The results of the respondents' ratings of the consultation sessions are given in Table A30. Thirty-seven of the forty respondents felt the experience was helpful; three felt the experience was of little help to them. Most of the respondents indicated that the sessions were open and frank.

Table A30
Respondents' Ratings of Consultation Sessions^a

Site	Response Options						$\bar{X}$	SD
	1	2	3	4	5	6		
Question 3a	Little Help To Me			Much Help To Me				
Seattle A	0	1	1	2	3	10	5.17	1.23
Fairfax	0	0	1	2	8	12	5.34	.83
Total	0	1	2	4	11	22	5.27	1.01
Question 3b	Cautious, Closed, Reserved			Open, Frank				
Seattle A	0	0	0	1	5	12	5.61	.60
Fairfax	0	1	2	2	5	13	5.17	1.19
Total	0	1	2	3	10	25	5.36	.99

^aGeneral directions: Please mark one box in each line.
Consultation sessions were:

The respondents rated the consultants' competence positively. The data are presented in Table A31. All but one of the respondents rated the consultants generally competent in areas where help was needed.

Table A31

Clients' Ratings of Consultants'
Competence in Areas of Needed Help

Site	Response Options						$\bar{X}$	SD
	1	2	3	4	5	6		
	Generally Incompetent			Generally Competent				
Seattle A	0	0	1	2	2	12	5.47	.94
Fairfax	0	0	0	0	6	17	5.73	.44
Total	0	0	1	2	8	29	5.62	.70

The clients were asked to rate how well they thought the consultants worked as a team; the results are presented in Table A32. All but two of the forty responded that the consultants worked well as a team.

Table A32

Clients' Ratings of How Well
Consultants Worked as a Team

Site	Response Options						$\bar{X}$	SD
	1	2	3	4	5	6		
	Did Not Work Well As a Team			Worked Well As a Team				
Seattle A	0	0	0	1	2	14	5.76	.56
Fairfax	2	0	0	0	1	20	5.52	1.44
Total	2	0	0	1	3	34	5.62	1.14

Two questions were included to provide the consultants with feedback from the clients concerning the usefulness of the activities conducted during the consulting experience. The clients were asked to list two or three things that were most helpful to them. A wide range of responses

were given; Table A33 includes a summary of the results. The responses were categorized into format issues, specific ideas or exercises that were helpful, techniques that were helpful, and personal attributes of the consultants. Twenty-eight responses referred to specific ideas or

Table A33

Clients' Perceptions of the Most
Helpful Things the Consultants Did

Response	Number of Responses
Format	
Well Organized	9
Clear Directions	3
Provided Skill Practice	2
Kept Climate Comfortable	1
Specific Ideas or Exercises That Were Helpful	
Presented Helpful Ideas	12
Problem Identification Techniques	8
Force Field Analysis	3
Use of Models	3
Handouts for Reference	3
Processes Used Were Helpful	
Clarified Thoughts and Feelings	8
Guided Rather Than Controlled	7
Gave Immediate Feedback	4
Dealing With Shared Feelings	3
Positive Reinforcement	2
Success in Their Efforts to Assist The Team	1
Personal Attributes of the Consultant	
Good Communication Skills	10
Flexible	4
Honest	2
Friendliness	2
Consultants Desire to Help the Group	2
Awareness of Group Roles	2
Fair and Diplomatic	1
Owning Their Own Ignorance	1

exercises; twenty-five referred to consultation techniques that were helpful; twenty-four responses related to personal attributes of the consultants; and fifteen responses mentioned the workshop format as being helpful to them.

The clients were also asked to list two or three things that were least helpful to them. The data are presented in Table A34. Nine of the thirty responses mentioned an exercise that was not helpful to them.

Table A34

Clients' Perceptions of the Least
Helpful Things the Consultants Did

Response	Number of Responses
Conducted an Exercise That Wasn't Useful	9
Displeasure With the Processes Used	
Time Limits	5
Consultants Became Emotionally Involved	3
An Arbitrary Decision was Made Without Involving the Group	1
Consultants Not Working as a Team	1
Disliked Joking by Consultants	1
Disliked Interruption by Consultants	1
Content	
Shouldn't Have Dealt With Long-Range Planning	2
Some Activities Were Confusing	1
Didn't Deal With Conflict	1
Didn't Deal With a Respondent's Communication Problem	1
Glossed Over Specific Skill Areas	1
Needed More Time to Plan	1
Needed a Clearer Definition of the Task	1
Forcing Old Skills	1

With the exception of a role-playing task which was disliked by two people, there were no commonly disliked exercises. Twelve responses indicated a displeasure with a process used in the consultation, and nine responses related to content issues.

The questionnaire required the clients to give an example of a change they intend to make as a result of the consultation. The results are presented in Table A35. All but two of the respondents were able to identify a specific change they intend to make as a result of the consultation sessions. Nine of the thirty-nine respondents indicated that they intend to be more open and direct; seven plan to be more responsible and active in a group; six indicated intentions to improve their communication skills; and six will apply the skills learned. Four respondents will work to improve their meetings. Seven respondents gave some other response.

Table A35

Clients' Perceptions of Something They Intend
to Do Differently Because of This Session

Response	Number of Responses
Be More Open and Direct	9
Be More Responsible/Active in a Group	7
Improve My Communication Skills	6
Will Apply the Skills Learned	6
Will Try to Improve the Meetings I Attend	4
Goal Setting--Problem Solving	2
Be More Objective	2
Use of Force-Field Analysis	2
Be More Positive	1

The respondents felt that there is a need in the educational community for consultants. The data are presented in Table A36. Thirty-one of the respondents indicated a strong need for such consultation; four respondents felt that there is probably some need, and one respondent expressed no opinion.

Table A36

Clients' Perceptions of Whether There Is a Need in the Educational Community for Educators With Group Process Consulting Abilities^a

Response	Number of Responses		Total
	Seattle A	Fairfax	
Definitely Strong Need	17	19	36
Probably Some Need	1	3	4
Probably Not Much Need	0	0	0
Definitely No Need	0	0	0
No Opinion	0	1	1

^aDo you believe there is a need in the educational community for educators with group process consulting abilities?

Generally, the respondents rated the consultation sessions and the competence of consultants positively. The respondents were able to identify a change they intend to make as a result of the consultation sessions.

Installers' and Trainers' Evaluations

The installers and trainers were interviewed by the evaluator to determine the adequacy of the training procedures and installation guidelines, and to document the kind of issues and difficulties they experienced. The trainers also kept logs of their training activities to document process and content issues that emerged.

Installers' Evaluations. The installers were asked to describe the significant events that led to the decision to install the PETC program and their objectives for doing so. This information has been provided in the description of the test sites (pp. 56-60). The installers also provided information about the cost of training for the district, and an opinion of the value of the training in terms of their personal objectives and the district's objectives, relative to the cost.

Both workshops in Seattle were financed by NWREL, including approximately \$6,000 in trainer fees and expenses, participant materials, workshop supplies and refreshments. The meeting facilities and four days of each participant's time were indirect expenses for the Seattle Public Schools. Participants volunteered five days of their own time for the workshop. The installer thought these expenses were definitely reasonable considering the benefits of the training.

The Fairfax workshop was financed largely by Fairfax County Public Schools. They provided approximately \$3,300 for trainer fees and expenses as well as meeting facilities and release time for participants. NWREL provided all participant materials and workshop supplies. The Fairfax installer thought the costs were fair, but may be too high for some school districts. He thought the potential payoff for this training was very high, but depends on the amount of support from the school district.

The installers provided information about their efforts in recruiting workshop participants and clients. The procedures they used are presented in the sections describing the workshop participants and practicum clients. Their evaluations of the installation process are described in the following paragraphs.

Both installers thought they were able to recruit the participant and practicum client groups with no serious problems. The only difficulty experienced was that there were too many applicants at both sites. One installer stressed the need to begin recruitment efforts for the practicum clients at least six weeks early. Another concern related to the goal of developing a cadre of skillful OD consultants for the district. It is important to screen potential participants for both motivation and potential expertise to avoid problems with participants dropping out of the program because of a lack of commitment or frustration with the difficulty in bringing about change. Finally, one installer described minor difficulty in developing the initial announcement for recruiting prospective client groups.

The information provided participants and clients for setting expectations for the workshop was developed by the installers and both thought it had been generally adequate. Two problems were reported. One installer said that a client group had expected the consultants to solve one of their problems, in spite of his efforts to make it clear that this should not be expected, and was therefore disappointed with the help received. Another problem was that numerous efforts were made to clarify for participants the nature of the training and its place in the district goals, but that some problems in expectations inevitably arose because people bring their own expectations and concerns to such a training program.

Both installers agreed that the installation guidelines, including suggestions for recruiting participants, clients and establishing relationships with district management, which they had received from William Ward, Office of Field Relations and Dissemination, NWREL, were helpful and probably essential for adequate installation.

The installers were asked to describe some of the possible negative side effects they thought might result from the PETC training program. The following is a list of their responses.

1. Participants may experience role conflict between their former role in the district and their emerging consulting roles.
2. If there is not adequate district support for the emerging consulting role, participants may lose interest and leave the district. The district loses not only the personnel in existing roles but also the resources used in the participants' training.
3. Through the training program participants develop expectations about becoming competent consultants in the district. District managers may not always share these expectations and may not support the role change.
4. Participants' efforts to use the PETC models to bring about change in the district may be seen as a form of sabotage by some district management who may in turn repress such training efforts in the future.
5. If participant consultants work with client groups from the district during their practicum consultations, the results of those consultations may affect the future image of the consultants in the district.

Trainers' Evaluations. The trainers were asked whether they found the workshop difficult or easy to administer and manage. All three trainers reported that while it may not have been easy, the workshop was very manageable. One trainer thought it was easier when someone else did the installation work. He reported some problems in participants wanting to negotiate time commitments for the workshop.

One of the trainers thought it was somewhat easier to administer the workshop the first time as a co-trainer with an experienced trainer. The second time he trained, however, he felt on top of it and felt he could train the system anywhere without great preparation.

All three trainers thought the session by session directions to the trainers were adequate. The trainer role was reported to be clear, feasible, interesting and challenging by all three trainers. Some environmental problems were experienced: inadequate space, cold temperatures and scheduling conflicts that resulted in moving to different facilities. There were also some difficulties reported in counseling participants regarding interpersonal problems within the consulting teams.

The trainers were asked to keep session by session logs of their training experience. The trainer logs were designed to document adherence to the training design and to note important issues or problems that arise in the content, or process of the workshop. The logs were maintained by the trainers, and information was collected on each session.

There were no major modifications made in the training design. Some time alterations were made but they were minor and seemed to relate more to differences between the sites than to problems in the instructional design. Specific content problems identified by the trainers have been given to the developers.

Two questions were raised by the trainers as potential problem areas. A question arose as to the desirability of allowing consulting groups to form prior to the workshop. This occurred at Seattle A and Fairfax and could involve the potential problems of having an incorrect number of consultants in the group and a lack of trainer control as to the placement of trainees in a consulting group. A second question was raised as

to whether consultants should be allowed to provide consultation to their own organizational unit. This question arose at Seattle 3 and the problem of conflict of interests was brought up.

Generally, the trainers had no major problems with the training design.

CONSULTING CASE STUDIES

Methodology

The evaluation design called for a series of case studies of the consulting performed by the PETC-II graduates at the three field test sites (Seattle A, Seattle B, and Fairfax). The case studies were designed to collect information on the amount and type of consulting done by the PETC-II graduates as well as information on the effects of the consulting. Data for the case studies was to be obtained through consulting logs maintained by the PETC-II graduates. Information on the effects of the consultations was to be collected through a preconsultation and postconsultation questionnaire administered to the clients by the PETC-II graduates.

A followup telephone interview of participants of two interim workshops, Portland and Eastern Washington, was planned to collect information on the amount and kind of consulting done, workshop satisfaction and perceptions of the utility of the training.

Due to problems in data collection, the design was revised. The consulting logs were not being completed and returned, and the preconsultation and postconsultation questionnaires were not being administered by the consultants. Additionally, economic problems in the Seattle school district resulted in some of the participants from the two Seattle sites losing their jobs and being unavailable for data collection. These complications necessitated a revision of the design.

The revised design called for followup interviews at both the three field test sites and two interim sites. Information was collected regarding the amount and kind of consulting done since training, participant perceptions of the usefulness of the training, and a judgment of the appropriateness of the workshop content and strategies. Additionally,

information was collected to determine participants' self-evaluation of their consulting ability. A consulting log was completed by those PETC-II graduates who had consulted.

Results

A total of 52 participants attended workshops at the 5 sites. Interview data was collected from 41. Table A37 shows the background characteristics of the total population compared to those from whom interview data was collected. No significant differences were found.

Consulting Activities

Of the 41 participants interviewed, 16 had not consulted. Of the 25 participants who did consult, 20 completed 1 or more consulting logs for a total of 33 completed consulting logs. Due to the variance in the number of consultation experiences reported, the lack of control over which consultation experience was reported (e.g., consultants may have tended to report only their most positive consultations) and the lack of information from the clients in the consultations, one must be careful in drawing generalizations about the typical consulting experiences of PETC-II graduates from the data collected in the consulting logs. The data, however, does provide useful information on those consultations reported.

The elapsed time since the PETC-II training varied from 7 months at Fairfax to 20 months at Portland. Table A38 presents the frequency of consulting by time duration since training. Although the amount of consulting varied across sites, this variance cannot be attributed to the time span.

Of the 41 people who were interviewed, 25 had consulted since the training. The amount of consulting ranged from once to 25 to 30 times. Of those who consulted, over half of them consulted from 1 to 4 times.

Table A37

Background Characteristics of Total Participants by Characteristics of those Completing Interviews

Biographical Characteristic	Total Seattle A	Interview Seattle A	Total Seattle B	Interview Seattle B	Total Fairfax	Interview Fairfax	Total Portland	Interview Portland	Total Washington, D.C.	Interview Washington, D.C.	Total All Sites	Interview All Sites
Professional Role:												
Administrator	1	1	3	3	6	6	6	5	6	5	22	20
Counselor/	7	4	6	3	4	4	0	0	3	2	20	13
Psychologist	0	0	1	1	0	0	1	1	3	3	5	5
Teacher/Professor	0	0	0	0	0	0	4	2	1	1	5	3
Other												
Educational Background:												
BA/BS	0	6	2	2	0	0	1	1	2	2	5	5
MA/MS	8	5	8	5	9	9	7	6	9	7	41	32
PhD/EdD	0	0	0	0	1	1	3	1	2	2	6	4
Sex:												
Male	2	2	6	4	7	7	7	4	4	4	26	21
Female	6	3	4	3	3	3	4	4	9	7	26	20
Previous Experience												
Conducting YTCP												
Workshops:												
GPS (from PETC-1)	8	5	10	10	10	10	8	5	6	5	42	35
INF	0	0	1	1	7	7	5	4	4	3	17	15
IPC	0	0	2	2	8	8	3	2	5	4	18	16
Other	3	0	7	5	7	7	7	6	9	8	33	26
Previous Training:												
IPC	8	5	10	7	10	10	7	5	8	7	43	34
RUPS	8	5	10	7	10	10	7	5	8	6	43	33
INF	8	5	10	7	10	10	10	8	10	8	48	38
PETC-1	8	5	10	7	10	10	8	5	11	9	43	36
Conflict	3	2	5	4	0	0	0	0	0	0	8	6
Organizational												
Theory	6	5	1	1	4	4	2	0	5	5	18	15
Other	4	1	7	6	4	4	4	3	4	4	23	18
Previous Consulting (in last 2 years):												
Technical	1	1	8	5	5	5	5	2	5	9	30	22
Group Process	2	0	6	4	8	8	7	5	11	10	34	27
None	4	3	2	2	1	1	1	1	1	0	9	7

Table A38

Frequency of Consulting by Time Duration Since Training

Number of Consultants	Time Duration Since Training					Total
	20 months (Portland)	14 months (E. Washington)	9 months (Seattle A)	8 months (Seattle B)	7 months (Fairfax)	
None	3	4	2	2	5	16
1	1		2	3	1	7
2			1		1	2
3		1		1		2
4		2			1	3
5		1		1	1	3
6		1				1
7						0
8					1	1
9						0
10	2					2
20	1					1
25-30	1					1
Unknown		2				2

An analysis was done of the amount of consulting after training of those with no prior consulting experience. The results are presented in Table A38. Of the 9 respondents who indicated that they had no prior consulting experience, 5 consulted after training, 4 did not.

Table A39
Amount Of Consulting After Training
Of Those Who Had Not Consulted Prior To Training

Site	Amount of Consulting Since PETC II												
	None	1	2	3	4	5	6	7	8	9	10	20	25-30
Seattle A N=4	2	1	1	--	--	--	--	--	--	--	--	--	--
Seattle B N=2	--	1	--	1	--	--	--	--	--	--	--	--	--
Fairfax N=1	1	--	--	--	--	--	--	--	--	--	--	--	--
Portland N=1	--	--	--	--	--	--	--	--	--	--	1	--	--
E. Washington N=1	1	--	--	--	--	--	--	--	--	--	--	--	--
Total N=9	4	2	1	1	--	--	--	--	--	--	1	--	--

Of the 41 people who were interviewed, 16 had not consulted since the training. An analysis of the effect of one's professional role on the amount of consulting done indicated that, for this sample, administrators were more likely to consult than non-administrators. Of the 22 administrators, 14 had consulted as had 4 of the 12 counselors, psychologists and social workers. The counselors, psychologists and social workers who did consult consulted less frequently than the administrators. Table A40 presents the frequency of consulting by professional role.

Table A41 lists the reasons given for not consulting. Eleven people indicated that they had insufficient time to consult. Six people indicated that their professional role did not include the possibility of consulting, and five people responded that no one had requested consulting help. Four responses indicated that the respondents are not

Table A40

Frequency of Consulting by Professional Role

Professional Role	Site	Number of Consultations													
		0	1*	1	2	3	4	5	6	7	8	9	10	20	25-30
Administrator/Coordinator	Seattle A			1											
	Seattle B		2		1	1		1							
	Fairfax	3					1	1					1	1	
	Portland	3		1											
	E. Washington	2	1				2		1						
	Total	8	1	4	1	1	3	2	1	0	0	0	1	1	0
Counselor/Psychologist	Seattle A	2			1										
	Seattle B	2	1								1				
	Fairfax	2	1												
	Portland														
	E. Washington	2													
	Total	8	0	2	1	0	0	0	0	0	1	0	0	0	0
Teacher/Professor	Seattle A			1											
	Seattle B														
	Fairfax														
	Portland														
	E. Washington		1			1									
	Total	0	1	1	0	1	0	0	0	0	0	0	0	0	0
Other: Consultants, Trainers, Librarian	Seattle A														
	Seattle B														
	Fairfax														
	Portland												1	1	1
	E. Washington							1							
	Total	0	0	0	0	0	0	1	0	0	0	0	1	0	1

*These respondents did consult, but the amount of their consulting is unknown.

Table A41

Frequency of Reasons Given for Not Consulting

Reasons	Number of Responses					Total
	Seattle A	Seattle B	Fairfax	Portland	E. Washington	
I prefer not do consulting	0	0	0	0	1	1
I didn't feel confident	0	0	0	0	0	0
My professional role did not include the possibility of consulting	2	2	2	1	1	8
Other priorities have left me with insufficient time	0	4	2	2	7	15
I have not been seen by prospective clients as a legitimate or viable consultant	0	0	1	1	1	3
No one has requested consulting help	1	2	2	1	0	6
Illness	0	0	1	0	1	2
I have no visibility as a consultant	1	3	0	0	2	6
Other	0	0	1	0	1	2

seen as consultants in their present role. One person indicated that he preferred not to do consulting, and five people gave some other response.

Of the consulting done by the PETC-II graduates, the information from the 33 consulting logs indicates that 24 of the consulting situations were with an educational organization; 5 involved human service agencies or associations, 2 with business organizations and 2 with library organizations.

The size of the client group ranged from 1 to 100 with nearly half of the consultants working with groups of 5 to 10. The duration of consultation ranged from 4 hours to 1 year, with nearly half of the consulting relationships of less than a 1½ months duration.

The PETC-II graduates' consulting experiences involved both internal and external consultation. Seven consultations were with clients who were part of the consultant's work unit, fifteen consulting relationships involved clients who were part of a different work unit in the same organization, and in eleven of the consulting relationships the client was a member of a different organization.

In 24 of the consultations the consultants were paid by their employer to help the client, in 6 cases the consultants were paid by the client group and in 3 cases the consultants volunteered their time.

In 18 of the consultations the consultant had an ongoing relationship with the client. Seven of the consultations involved clients being referred to the consultant by a third party. The consulting relationship was initiated by the client in 22 of the cases. Eight cases were initiated by the consultant, and three were initiated by both the client and the consultant.

This data is consistent with the developers' expectations that PETC-II graduates' client systems will be small groups or a major subsystem of the organization, and the usual client duration will be a few days or weeks.

Table A42 is a summary of the consultations reported in the consulting logs. The table includes information on the type of client group, a description of the problem, the consultant's goals for the client, and information from the consultant on the outcome of the consultation. As is shown in Table A42, the consultants worked on a wide range of client problems and goals as was expected. Thirteen of the thirty-three consulting situations involved the consultant's planning or conducting a workshop or training.

The consultants were asked which of the strategies and procedures presented in PETC-II were utilized in their consultations. Table A43 indicates the number of consultations which reported using each of the strategies and procedures. The strategies most frequently used were: problem solving, plan making, improving communications and providing data feedback. Those least frequently used were: strategies of programmed instruction, simulation and gaming, action research and logical analysis. This is consistent with the descriptions of the client problems, many of which dealt with issues of problem solving and poor communication.

Twenty-seven of the consultations reported positive outcomes; two consultations reported both positive and negative outcomes and two consultations reported negative outcomes. No outcome information is available for 2 of the consultations. This indicates that the consultants felt that their consultations had been helpful to the client in solving their problems. The outcome information for 6 of the 29 cases was based

Table A42

Consultation Summaries

Client Group	Description of the Problem	Goals	Outcomes
Early childhood education teachers; Headstart para-professionals	Not certified as child development associations but would like to be; groups need to demonstrate performance and competence	Assist in providing self-assessment	Parents and children more involved in learning; staffs have gained self-confidence in having their behavior observed; close relationship between staffs
Developmental Disabilities Council	Lack of organizational structure; lack coordination among groups	Problem solving	Consultant observed change in leadership style of director; increased coordination with other agencies
Two member teaching team	Tensions between two teachers	Improve communication; identify value conflicts of team members; guide new team member to establish himself as a teacher and a positive member of the team	Communication improved; new team member more relaxed and secure in position; consultant withdrew and established position of helping teacher to continue support system; helping teacher did not follow through on job
Business--sales department	Communication problems low level of shared decision making; lack of sensitivity to individual needs	No information	Increased communication; personnel setting own sales goals
School staff reading program; involves staff, advisory council; parents; inter-staff relationships	Need to redefine reading program; clarification of parents' role; increase parent participation	Improve communication; initiate shared decision making; build trust	Survey completed, resulted in increased participation by parents, advisory board

Table A42 (Continued)

Client Group	Description of the Problem	Group	Outcomes
Special education counselor group	No coordination of services	Improve communication between teachers and support personnel about student needs; build trust	Group set up regular meetings to discuss individual student cases; developed plan for new students; developed plan for crisis situations; communication guidelines developed
Professional group within non-educational organization	Wanted a continuing educational experience to enable them to deal with change (automation)	Problem solving; delineation of needs; prioritize needs; plan of action to meet needs	Request for further training; development of continuing education committee; informal feedback positive
Board of human service association	Changing decision making style; developing program for coordination with other organizations	Define relationship between groups; avoid destructive confrontation between board and service agency	Cooperation between groups; board set up planning sessions
Alternative education staff	Trying to establish alternative education program	Team building; conflict resolution; role clarification	Agreed to terminate client-consultant relationship due to a lack of progress
PTA organization	Group wanted to explore non-traditional goals of PTAs	Goal setting; team building	Feedback from clients and the consultant's observations indicated an increased awareness and knowledge of group process
School staff planning leadership retreat for students	Needed to develop program for leadership development in students	Provide group process training and skills training materials	Highly successful workshop; consultant's observations indicated that students and staff got excited; student training has been incorporated into the program; students increased plan making skills

Table A42 (Continued)

Client Group	Description of the Problem	Goals	Outcomes
Non-educational organizational planning group workshop	Working toward change (automation)	Setting goals; problem solving	Employees requested continuing re-education on automation; director gave positive feedback on workshop
Students of college program	Develop skills for group learning activities	Improve communication; trust building; problem solving	Reorganize learning groups; referred some students to counseling department; students and faculty reported that the learning experience became more satisfactory
Students of college program	Develop capability for group learning activities	Improve communication; problem solving; trust building; evaluation skills; skills to perform helper-helpee relationship	There was an improvement in 15 out of the 19 participants in their interpersonal relationships and ability to function in groups; request for further training
Students in camp management class (college)	Having problems looking at leadership styles and decision making	Demonstrate and develop their leadership abilities; increase their knowledge of leadership patterns and problems	Instructor and consultant satisfied with growth; students looking at action alternatives; more confident about director role
Business manager	To develop a training program for intake counselors; conduct training	To teach communication skills which facilitate sensitivity; problem identification and identification of need	Counselors have greater confidence in their skills; greater trust among counselors; requested additional training from consultant

Table A42 (Continued)

Client Group	Description of the Problem	Goals	Outcomes
School human relations committee	Help improve interpersonal relationships among faculty	No information	No information
School consortium	Decentralize work unit stress between student and faculty and student-student	No information	Ongoing process was developed so faculty could identify needs and see areas for growth
School staff development committee	New staff development committee was formed after previous one couldn't complete task and resigned; the new committee requested a consultant help them in their involvement with the staff in identifying staff development needs	Facilitate the client to use available data to identify potential intervention strategies with building staff; train client in process skills and consultation strategies	Client group developed process plan for collecting data from staff about their needs for staff development/training; client assisted building staff in use of data; members reported satisfaction with staff achievements, improved communications, and group planning abilities; they indicated dissatisfaction with trust levels, groups' failure to deal with member feelings, task orientation of the principal and group failure to recognize and deal with conflict.
Student council	Students unable to identify needs, problems, or appropriate kinds of responses to them; no leadership; poor communication	Develop leadership; achieve awareness of organizational skills; develop sense of commitment to the school	Trust within the group has improved; some self discipline has developed plus a sense of belonging, additionally accepting the need for some responsibility on the part of each student

Table A42 (Continued)

Client Group	Description of the Problem	Goals	Outcomes
Group of activity coordinator, student body officers, teachers, formed to plan student leadership workshop	Needed to develop one-day workshop emphasizing leadership skills	Develop workshop	Workshop was planned; followed format; completed tasks of problem solving and planning
School administrators	Design a staff orientation workshop	Design a workshop to meet expected needs of administration	Matched skill exercises with goals that were set - workshop had not been given at time log completed
School guidance staff*	Diversified staff that needed help to redefine its role as a team	Role definition; improve communication; problem solving; trust building	Communication improved; roles became more flexible; designed a plan and implemented it; scheduled meetings
Human service organization conference	Conduct conference; young people wanted more involvement in association	Problem solving	Leaders expressed satisfaction with the process; students appeared to have enjoyed the conference
School staff	Preparing to implement open concept teaching	Improve communication; trust building; problem solving	Positive verbal feedback from teachers; principal reported that she'd gained perspective and greater perceptions by having an outside consultant; all teachers implemented open concept teaching
Subunit of human service agency	Plan and conduct week-long problem solving conference	Goal setting	Evaluation of workshop was conducted; consultant reported positive results; goals were set; action implemented

*Two PETC II participants consulted as a team.

Table A43

Frequency of Reported Use of the
Strategies/Procedures

Strategies/Procedures	Number of Responses					Total
	Seattle A	Seattle B	Fairfax	Portland	E. Washington	
Skills Training Exercise	1	3	1	4	9	18
Training Workshop	0	1	0	2	5	8
Programmed Instruction	0	0	0	1	2	3
Role Playing	0	1	2	3	6	12
Simulation and Gaming	0	1	0	2	2	5
Confrontation	3	3	4	3	5	18
Referral	0	0	1	1	6	8
Demonstration	0	2	2	2	8	14
Process Observation	1	4	2	4	6	17
Data Feedback	2	5	4	5	9	25
Action Research	0	0	2	2	3	7
Improving Communications	2	4	4	5	8	23
Logical Analysis	0	1	2	1	5	9
Value Exploration	2	5	3	2	5	17
Negotiation	1	2	4	2	2	11
Problem Solving	2	6	5	4	9	26
Plan Making	0	6	4	3	9	22
Multiple Entry	2	1	0	2	4	9

on feedback from the clients. In 13 of the consultations the outcome information includes specific ways in which the client had been helped, such as an increase in communication skills. Products indicating successful consulting such as the development of new goals or the completion of a survey are listed as outcomes in 10 of the consulting situations. It would be desirable to collect information from the client groups on their perceptions of the usefulness of the consulting provided by the PETC-II graduates.

All but 1 of the respondents indicated that they had used the training in less formal ways than actual consulting. The identifying of areas of needed organizational change, helping a group develop a program or organization for meeting a goal, organizing and planning your own efforts to help a group, helping your own group through a change process, and helping someone understand a potentially destructive experience in a group or organization as part of a counseling process were indicated by 25 to 32 people as ways in which they used the training. Table A44 shows the number of people indicating that they had used the training in these less formal ways.

Table A44
Number of Respondents Using Training in
Less Formal Ways Than Actual Consulting

Use of Training	Number of Responses					Total
	Seattle A	Seattle B	Fairfax	Portland	E. Washington	
Identifying for yourself or others areas of needed organizational change	3	3	8	3	10	29
Helping a group develop a program or organization for meeting some goal	1	5	7	3	9	25
Organizing and planning your own efforts to help a group	5	5	8	3	11	32
Helping your own group through a change process or to reach a goal	5	6	5	3	9	28
Helping someone understand a potentially destructive experience in a group or organization as part of a counseling process	5	5	5	3	10	28

The PETC-II graduates were asked what place PETC-II consulting holds in their future plans. The results are presented in Table A45. Twenty-four of the thirty-seven respondents indicated that they plan continued use of the consulting skills. Five respondents indicated that they would like a job with consulting responsibilities; three of these five indicated that they were unable to consult because of a lack of organizational support.

Table A45

Responses to the Question "What Place Does PETC-II Consulting Hold in Your Future Plans?"

Response	Number of Responses					Total
	Seattle A	Seattle B	Fairfax	Portland	E. Washington	
Plan continued use of skills	3	3	5	4	9	24
Would like a job with consulting responsibilities	2	1	1	0	1	5
Consulting important but not using it presently	0	2	0	0	0	2
Strong interest in consulting, see it as helpful	0	0	1	0	1	2
Different view of self, district sees job role differently as a result	0	0	0	1	0	1
Unsure	0	1	0	0	0	1
No longer interested in consulting	0	0	1	0	0	1
Would like to see more consulting done in the district	0	0	1	0	0	1

Table A46 presents the responses to the question on expectations of future consulting. All but one of those responding to the questions indicated that they had planned to do consulting in the future. Eighteen of those had definite plans to do consulting, and sixteen hoped to do consulting sometime in the future.

Table A46

Do You Expect to Do Consulting in the Future

Response	Number of Responses					Total
	Seattle A	Seattle B	Fairfax	Portland	E. Washington	
I have definite plans to do process consulting	1	3	4	2	8	18
I hope to do consulting sometime in the future	4	4	3	4	2	17
I don't expect to do much consulting	0	0	0	0	1	1

Self Perceived Consulting Ability

Table A47 presents the PETC-II graduates' self-ratings of ability. The respondents rated themselves most capable of building a helping relationship, identifying of alternative solution strategies and understanding group processes and problems. The respondents felt least capable of helping to build motivation to change, helping the group generalize and stabilize their change and helping the group evaluate the change and change effort.

Followup Evaluation of the Workshop

Respondents were asked how worthwhile they thought the workshop had been after several months. The workshop was evaluated highly by the respondents. Table A48, page 133, shows the responses to questions on worth and utility of the workshop. All but one of the respondents evaluated the workshop as being worthwhile with half of the respondents judging it to be extremely worthwhile. Those interviewed were asked what major factors contribute to their rating of the worth of the workshop. As is shown in Table A49, page 134, 46 positive factors contributing to the respondents' workshop evaluation. Eleven responses mentioned personal growth or attitude changes made as a result of the training as a positive factor. Eleven responses referred to the utility

Table A47

Respondents' Self Ratings of Ability

Consulting Ability Being Rated	Site	Response Options					$\bar{X}$	SD
		Excellent 1	Good 2	Satisfactory 3	Questionable 4	Unsatisfactory 5		
Building a helping relationship of confidence and trust	Seattle A	4	0	1	0	0	1.40	.89
	Seattle B	2	5	0	0	0	1.71	.49
	Fairfax	8	2	0	0	0	1.20	.42
	Portland	3	3	0	0	0	1.50	.55
	E. Washington	6	4	1	0	0	1.54	.68
	Total	23	14	2	0	0	1.46	.60
Helping to determine if change is needed and what should be changed	Seattle A	1	3	1	0	0	1.70	.82
	Seattle B	3	2	2	0	0	2.00	.93
	Fairfax	1	6	3	0	0	2.20	.63
	Portland	1	4	1	0	0	2.00	.63
	E. Washington	3	7	1	0	0	1.81	.60
	Total	9	22	8	0	0	1.97	.67
Helping to build motivation to change	Seattle A	0	3	2	0	0	2.25	.50
	Seattle B	0	4	2	1	0	2.57	.79
	Fairfax	3	1	3	1	1	2.55	1.42
	Portland	0	2	4	0	0	2.66	.51
	E. Washington	2	4	4	1	0	2.36	.92
	Total	5	14	15	3	1	2.50	.93
Clarifying expectations about the consulting relationship, like duration of the relationship, restrictions, fees and expenses, client and consultant roles, etc.	Seattle A	1	2	2	0	0	2.20	.84
	Seattle B	2	4	1	0	0	1.86	.69
	Fairfax	5	3	1	0	0	1.55	.73
	Portland	1	2	2	1	0	2.50	1.04
	E. Washington	4	3	1	3	0	2.27	1.27
	Total	13	14	7	4	0	2.05	.98
Gathering data or information about the group's effectiveness	Seattle A	0	4	1	0	0	2.20	.45
	Seattle B	1	4	1	1	0	2.00	.63
	Fairfax	2	6	1	0	0	1.89	.60
	Portland	3	3	0	0	0	1.50	.55
	E. Washington	4	6	1	0	0	1.72	.64
	Total	10	23	4	1	0	1.63	1.07
Understanding your own ability to help a group	Seattle A	2	2	1	0	0	1.80	.84
	Seattle B	1	3	3	0	0	2.29	.76
	Fairfax	2	7	0	0	0	1.78	.44
	Portland	1	4	1	0	0	2.00	.63
	E. Washington	4	6	1	0	0	1.72	.64
	Total	10	22	6	0	0	1.89	.65

Table A47 (Cont Inued)

	Consulting Ability Being Rated	Site	Response Options					$\bar{x}$	SD
			Excellent 1	Good 2	Satisfactory 3	Questionable 4	Unsatisfactory 5		
Diagnosing the group's problems and difficulties		Seattle A	0	3	1	1	0	2.60	.89
		Seattle B	0	4	3	0	0	2.43	.53
		Fairfax	2	5	2	0	0	2.00	.71
		Portland	1	3	1	1	0	2.33	1.03
		E. Washington	4	5	2	0	0	1.81	.75
		Total	7	20	9	2	0	2.16	.79
Helping the group understand its problems and difficulties		Seattle A	1	1	3	0	0	2.40	.89
		Seattle B	0	3	3	1	0	2.71	.76
		Fairfax	2	3	4	0	0	2.22	.83
		Portland	0	4	2	0	0	2.33	.52
		E. Washington	2	8	1	0	0	1.90	.53
		Total	5	19	13	1	0	2.26	.72
Helping the group to prioritize the major problems and issues and then decide on the problems to be solved		Seattle A	1	3	1	0	0	2.00	.71
		Seattle B	1	6	0	0	0	1.86	.38
		Fairfax	3	5	1	0	0	1.78	.67
		Portland	1	4	1	0	0	2.00	.63
		E. Washington	5	5	1	0	0	1.63	.67
		Total	11	23	4	0	0	1.82	.61
Helping the group develop goals for change		Seattle A	1	2	2	0	0	2.20	.83
		Seattle B	1	4	2	0	0	2.41	.69
		Fairfax	4	4	1	0	0	1.67	.71
		Portland	3	2	1	0	0	1.67	.82
		E. Washington	4	7	0	0	0	1.63	.50
		Total	13	19	6	0	0	1.81	.69
Helping the group identify alternative solution strategies		Seattle A	1	3	1	0	0	2.00	.71
		Seattle B	1	5	1	0	0	2.00	.54
		Fairfax	3	6	0	0	0	1.67	.50
		Portland	1	5	0	0	0	1.83	.41
		E. Washington	5	6	0	0	0	1.54	.52
		Total	11	25	2	0	0	1.76	.54
Helping the group select an appropriate strategy		Seattle A	0	3	2	0	0	2.40	.55
		Seattle B	1	3	3	0	0	2.29	.76
		Fairfax	2	4	3	0	0	2.11	.78
		Portland	0	6	0	0	0	2.00	.00
		E. Washington	3	7	1	0	0	1.81	.60
		Total	6	23	9	0	0	2.18	.63

Table A47 (Continued)

Consulting Ability Being Rated	Site	Response Options					$\bar{X}$	SD
		Excellent	Good	Satisfactory	Questionable	Unsatisfactory		
		1	2	3	4	5		
Helping the group develop plans to implement your strategy	Seattle A	0	3	2	0	0	2.40	.55
	Seattle B	0	5	2	0	0	2.29	.49
	Fairfax	4	2	3	0	0	1.89	.93
	Portland	1	4	1	0	0	2.00	.63
	E. Washington	3	6	2	0	0	1.90	.70
	Total	8	20	10	0	0	2.05	.76
Helping the group implement the change strategy	Seattle A	0	3	2	0	0	2.40	.52
	Seattle B	1	5	0	1	0	2.14	.90
	Fairfax	3	3	2	1	0	2.11	1.05
	Portland	1	1	3	1	0	2.67	1.03
	E. Washington	2	6	2	1	0	2.18	.87
	Total	7	18	9	4	0	2.26	.89
Helping the group generalize and stabilize the change	Seattle A	0	2	2	1	0	2.80	.81
	Seattle B	0	3	2	2	0	2.86	.90
	Fairfax	1	4	2	2	0	2.55	1.01
	Portland	1	1	2	2	0	2.83	1.17
	E. Washington	2	6	2	1	0	2.18	.87
	Total	4	16	10	8	0	2.58	.95
Helping the group evaluate the change and change effort	Seattle A	0	2	3	0	0	2.60	.55
	Seattle B	0	3	2	2	0	2.86	.90
	Fairfax	0	5	3	0	1	2.67	1.00
	Portland	1	3	1	1	0	2.33	1.03
	E. Washington	2	6	3	0	0	2.09	.70
	Total	3	19	12	3	1	2.47	.86
Effectively closing the consulting relationship	Seattle A	2	2	0	1	0	2.00	1.22
	Seattle B	1	4	1	1	0	2.29	.95
	Fairfax	3	3	2	0	0	1.88	.83
	Portland	1	3	2	0	0	2.17	.75
	E. Washington	2	4	4	1	0	2.36	.92
	Total	9	16	9	3	0	2.16	.90
Understanding group processes and problems	Seattle A	1	3	1	0	0	2.00	.71
	Seattle B	0	5	2	0	0	2.29	.47
	Fairfax	4	5	0	0	0	1.55	.53
	Portland	3	2	0	1	0	1.83	1.17
	E. Washington	7	4	0	0	0	1.36	.50
	Total	15	19	3	1	0	1.74	.72

Table A48

Frequency of Respondents' Ratings
of the Worth and Utility of the Workshop

Question	Site	Response Options					
		Not at all worthwhile 1	2	3	4	5	Extremely worthwhile 6
Now that some time has passed since the workshop, how worthwhile has that experience been to you?	Seattle A	0	0	0	1	3	1
	Seattle B	0	0	0	1	3	3
	Fairfax	0	0	0	1	1	8
	Portland	0	0	1	0	2	4
	E. Washington	0	0	0	3	3	6
	Total	0	0	1	6	12	22
Overall, how useful has the experience been to you in helping groups solve problems or achieve goals?	Seattle A	0	0	0	2	3	0
	Seattle B	0	0	0	2	4	1
	Fairfax	0	0	0	2	2	5
	Portland	0	0	0	4	1	2
	E. Washington	0	0	0	5	4	2
	Total	0	0	0	15	14	10

Table A49

Factors Contributing to the Respondents' Evaluation of the Workshop

Factors	Number of Responses					
	Seattle A	Seattle B	Fairfax	Portland	E. Washington	Total
<i>Positive</i>						
Utility of the training--respondents plan continued use of skills	1	2	4	0	4	11
Personal growth or attitude changes were made as a result of the training	2	1	3	1	4	11
Helpful or interesting concepts were introduced in the instructional system	1	3	3	2	0	9
Workshop reinforced respondents existing skills and concepts	0	1	2	1	3	7
Skills developed through the training	1	0	1	1	2	5
Format of the workshop	0	0	1	2	0	3
<i>Negative</i>						
Disliked format	0	0	0	3	1	4
Did not learn skills	1	0	0	1	0	2
Other	1	0	0	0	1	2

of the training and their plans for the continued use of the skills learned. Nine of the responses referred to the concepts introduced in the instructional system as being helpful or interesting. The training reinforced existing skills and concepts for 7 of the respondents. Five respondents mentioned specific skills they had developed through the training as contributing to their positive evaluation of the workshop. Three people gave examples of how the format of the workshop was a positive factor for them.

Among negative factors contributing to their workshop evaluation, 4 people mentioned the workshop format. The skill needs were not met for 2 respondents, and 2 people mentioned some other reason as a negative factor contributing to their workshop evaluation.

In response to an interview question, all of the respondents indicated that they felt the training experience had been useful to them in helping groups solve problems or achieve goals. Ten of the thirty-nine respondents found the training experience "extremely useful."

The results of two questions designed to collect information on the participants' satisfaction with the content and strategies presented in the workshop are presented in Table A50. All but one of the respondents rated the content and strategies as good or excellent.

The participants were asked whether they felt the outcomes of the workshop were worth the time they invested. The results are presented in Table A51. Twenty-nine respondents felt the time costs were small for the outcomes, and eleven felt the costs were about right for the outcomes.

Table A50

Respondents' Evaluation of the Workshop
Content and Strategies

Question	Site	Response Options			
		Excellent	Good	Fair	Poor
Did you feel the skills and knowledge that were taught were appropriate for learning to consult?	Seattle A	3	1	1	0
	Seattle B	3	4	0	0
	Fairfax	9	1	0	0
	Portland	3	4	0	0
	E. Washington	3	8	0	0
	Total	21	18	1	0
Did you think the workshop format and learning activities were appropriate for learning to do consulting?	Seattle A	1	4	0	0
	Seattle B	2	5	0	0
	Fairfax	4	5	0	0
	Portland	2	5	0	0
	E. Washington	2	7	1	0
	Total	11	26	1	0

Table A51

Respondents' Satisfaction with the
Time Costs of the Workshop

Question	Site	Response Options		
		costs were small for outcomes	costs were about right	costs were too great
Do you feel the outcomes of the workshop were worth the time you invested?	Seattle A	4	1	0
	Seattle B	6	1	0
	Fairfax	7	3	0
	Portland	6	1	0
	E. Washington	6	5	0
	Total	29	11	0

INTERNAL SUMMATIVE REVIEW

Methodology

Selection of Reviewers

The PETC reviewers were chosen from peer nominations of individuals who are experienced and competent in school intervention and consultation. Through the process described below, we asked people to nominate individuals whose opinion they respected in reviewing a training program in organization development. The four reviewers selected were Bunyan Bryant, Assistant Professor, School of Natural Resources, University of Michigan and former member of the Educational Change Team, Ann Arbor, Michigan; Ann Burr, elementary school teacher and member of the Cadre of Organizational Communication Consultants, Eugene Public Schools, Eugene, Oregon; Gene Mulcahy, Trustee of the Knox Foundation and former Director of Shanti School, Hartford, Connecticut; and Bonnard Wilson, consultant with the Leadership Institute of Spokane and former UNESCO Consultant to the Ministry of Education, Indonesia, Rhodesia, Panama and the Philippines.

The Review Board was chosen through the nominations of 22 people involved in educational change. To maximize the different possible networks of individuals involved in school intervention, a stratified sample of nominators was selected from the following sources: 1) individuals having had organizational development experience as listed in *Organizational Development in the Schools* (Schmuck and Miles, 1970), 2) individuals listed in the directory of the International Association of Applied Social Scientists, and 3) authors listed in the *Bibliography on Organizational Change in Schools* (Runkel, 1974). The individuals compiled from these lists were placed on a matrix consisting of four

regions in the United States and four institutional affiliations (university, research organization, educational affiliation or private consultant). An individual was randomly chosen in each cell and contacted by mail explaining the purpose of the Review Board (see enclosed letter) and contacted by telephone to nominate individuals for the Review Board. Nominators ranked their choices and points were given to the nominees. Five points were assigned their first choice, four points their second choice, and so on. The object was to select those individuals with the highest scores to be on the PETC Review Board.

Contrary to our expectations that several people would be given high rankings from the combined scores of their peers, there was almost no repetition of nominees. In fact, there were 98 different nominations by the 22 nominators. Only three individuals scored higher than six points (meaning recommendations from two or more people); those were Matthew Miles, Richard Schmuck and Mark Chesler. Miles and Schmuck had been earlier eliminated as potential reviewers because of earlier or current association with the Program and Chesler was not available (however, one of his associates, Bunyan Bryant, was on the Review Board).

Twenty-six individuals were the first choice of nominators (some nominators had more than one first choice). Considering we had not met the objectives of selecting individuals who had been repeatedly nominated by their peers, we composed the Review Board from these 26 names to include individuals who met the following criteria:

1. An individual with a training and development focus who had worked with instructional systems in education. Bonnard Wilson met these criteria.
2. An individual with an educational focus who had also worked in training and school consultation. Ann Burr and Gene Mulcahy met these criteria; the former working within the public sector, the latter working in the private sector of alternative schools.

3. An individual with a broad systems change perspective who had worked in schools. Bunyan Bryant met these criteria.
4. In addition, there was a concerted effort to have the Review Board composed of individuals of different ages, ethnicity and sex.

All of these criteria were met in the final composition of the Review Board.

The Review Process

The members of the Review Board met at the Northwest Regional Educational Laboratory in Portland for four days to become familiar with the goals and procedures of the three instructional systems and to prepare a formal summative review. The agenda and a brief description of activities during the four days is presented in the following paragraphs.

On the first day the following people made presentations about PETC and the review procedure:

1. Charles Jung, Director, presented the Purposes and Goals of PETC
2. Ruth Emory and Rene' Pino, Developers, presented an Overview of PETC
3. Gary Milczarek, Evaluator, discussed Product Expectations for a Summative Review
4. Richard Arends, Evaluator, reviewed Evaluation Results of PETC

Time was provided for the reviewers to begin their study of the materials and additional plans were made for the remaining days of the review conference.

During the first day of the conference, the agenda had been arranged for maximum input from the NWREL staff involved in PETC. There were times

allotted for formal presentations and for dialogue between the Reviewers and the PETC staff. By the end of the day the expectations and work tasks were clearly delineated and the Reviewers collaborated on the conference agenda by determining their needs for further discussions, feedback and work time.

On the second day work time was provided for the reviewers in the morning. In the afternoon the Review Board met with five graduates of the PETC series.

This was a particularly exciting and profitable afternoon. The reviewers designed the afternoon for maximum learning about the experiences of five individuals who had participated in PETC. The reviewers requested that no member of the development or evaluation staff be present and only Pat Schmuck, the conference documenter, was allowed. The agenda for this meeting included:

1. Introductions (20 minutes)
2. PETC Biography for each graduate (30 minutes)
3. Subgroups (45 minutes)

Reviewers and PETC graduates broke into subgroups to focus on one instructional system each.

4. Fish Bowl: Reviewers met inside and talked about their impressions, concerns and perceptions of strengths and weaknesses.
5. Fish Bowl: PETC graduates met and reacted to the statements made by the reviewers.
6. Debriefing of Total Group

The five PETC graduates included 1) Tommy Tompkins, Administrative Assistant, Metropolitan Learning Center, Portland Public Schools and PETC participant; 2) Walter Stickle, Staff Consultant, Sellwood School, Portland Public Schools and PETC participant; 3) Tom Wilson,

Assistant Principal of Curriculum and Organization Development, Newport High School, Newport, California and Installer in the Orange County area for several workshops; 4) Robert McGlone, Executive Director of Training Enterprises New Techniques and Senior trainer for three PETC-II workshops; 5) James Forneris, Associate, Training Enterprises New Techniques, formerly with Seattle Public Schools and Installer for PETC in Seattle.

The issues of this discussion will be included in the next section on Review Issues.

The third day consisted of reviewer work time and a reviewer feedback meeting. Reviewers met with program developers and evaluators for the purpose of presenting their preliminary conclusions about the strengths and weaknesses of the PETC system. This provided an opportunity for developers to share additional information and perceptions and for reviewers to seek clarification where needed. Again, the substantive issues raised in this meeting will be presented in the next section on Review Issues.

The fourth day of the conference included reviewer work time and an evaluation of the conference. The Review Conference was evaluated highly by Reviewers and Program Staff; everyone concurred that it had been a useful, productive and exciting conference. The structuring of the conference allowed sufficient time for Reviewer deliberation, reading and writing. (Some reactions to the conference are noted in the review by Gene Mulcahy.)

In particular, the strongest point made was that the mode of the conference replicated some of the major points of PETC which stresses an inquiry approach to teaching and learning and includes the assumption that the learner is best able to diagnose and solve his/her own problems.

Although the purpose of the review was summative and the products are in their final stage, the concerns represented by the Review Board were considered useful and important by-products to the staff in considering long-range objectives for the program.

Results

The following section consists of a summary of the four written reviews and of the discussions occurring during the conference.

The Rationale and Goals of the PETC Series

Clarity. Bunyan, Burr and Mulcahy applauded the "concise, clear and outstandingly comprehensive" aspect of the PETC system, "clarity is one of the most impressive aspects of the system." Wilson, however, believes that greater use of behavioral objectives (not instructional objectives--the emphasis should be on learner outcomes) would improve the specificity of the program. The issue of behavioral objectives was raised during meetings with developers. Other reviewers and PETC program staff believed increased emphasis on specificity of behavioral outcomes may decrease the potential flexibility to the training program to be adaptable to client concerns.

Logic (Conceptual adequacy). All reviewers agreed that the conceptual logic of the program is sound and consistent. One concern expressed by all reviewers (as well as by Wilson who suggested more precise statements of behavioral objectives) was that the systematic and consistent sequencing of exercises *may not* be flexible enough to be adapted to a variety of learner needs and situations.

Social Significance. This issue continually arose throughout each meeting and is apparent in all the reviews. There were several different concerns represented under the general category of *Social Justice Concerns*.

The first concern is related to the PETC target populations. The inability to select workshop participants (although in some instances when a district offers the training there are selective criteria applied) perpetuates the exclusion of individuals not able to pay for the training either in dollars or time. Consequently, the progression from initial training to trainer status seems to include a process of sex and race differentiation. Whereas there are more women and minorities in the beginning phases, the emergent status of trainer is dominated by white males.

The second concern is related to the neutral value stance of PETC. Bryant and Mulcahy point this out most clearly in their reviews. Bryant, most forcefully, pointed out the "partisan venture of PETC training." During the meeting with the PETC graduates this issue was raised several times. Although the PETC developers and the PETC graduates acknowledged the so-called "neutral stance" of the materials, the graduates in particular pointed out that in their experiences social concerns played a predominant role in the training because the trainees in PETC brought these concerns with them. Examples were given about the social concerns that they faced in their jobs and how these issues became the content of the learning process. In addition, in some cases the client systems for PETC trainers were directly involved in concerns of social justices such as the Human Rights Division of a school district.

A suggestion was made that an additional package be constructed that would directly deal with problems of social justice. The ITCP package on *Social Conflict and Negotiative Problem Solving* was viewed as a potential answer to this problem.

1
A third social justice concern related to sexist and racist implications. The use of sexist language (the teacher, she; the principal, he) was pointed out by all the reviewers. In addition, the settings of exercises were pointed out to reflect a white and middle-class orientation to the world.

Finally, a fourth concern was the potential "misuse" of PETC. Bryant, in particular, stressed the potential misuse of PETC training. While developers and PETC graduates believed there was a potential problem that "someone who is 'screwing kids over' could learn to do it better", the PETC graduates defended the training by emphasizing the process of training requires people to look at and begin to understand their motives and intentions; the training helps "people get their head on straight." One brief semi-serious discussion concerned predictions about what might happen to an Archie Bunker who participated in PETC training.

Comparing PETC to Other Training Programs

One topic of discussion among the PETC graduates and reviewers was comparable educational programs. The PETC graduates unanimously agreed there were no comparable experiences within traditional university programs.

Mulcahy and Burr addressed this question in their reviews. Mulcahy's alternative stressed the functions of an organizational consultant meeting with a client group to mutually assess problems, develop objectives and develop a training and evaluation design. Burr, on the other hand, stressed the organization development efforts of Schmuck and Runkel in developing internal sources for consultation in CADRES. Both of these reviewers stressed the *flexibility* offered in their alternative approach.

One concern expressed in discussions and in the reviews by Wilson and Mulcahy was the lack of emphasis on affective education; while the

purposes of PETC clearly state the focus will *not* be on a personal growth issues, Wilson in particular believed the training *could* include more affective learning (he pointed to the packages of the Human Development Institute as an example.)

Content Concerns. According to Bryant, ". . . it is probably one of the best conceptual and integrative organizational change and development pieces to date. . . the PETC system was clearly integrated into a meaningful whole, integrating skills and theoretical concepts, and activities that went from simple to more complex." Burr, Mulcahy and Wilson stated similar opinions of the conceptual content of PETC. The words "awed," "impressed," "breath-taking" were used by the reviewers to describe their reaction to the developmental work.

However, some shortcomings were noted:

Time and money. Although all reviewers agreed this is a major issue for all substantive organizational change strategies, it also was introduced as a limitation of PETC.

Inflexibility of system. While on the one hand reviewers were impressed with the conceptual integration and integrity, they expressed a concern that the structure may impede trainee learning. This question arose particularly in the discussion with PETC graduates who acknowledged during the course of training they often were unsure why certain concepts or exercises were introduced. The gestalt was difficult to see until one had completed the entire package.

Overload of materials. This was pointed out especially in regard to PETC-III. The developers, however, had made changes in the timing of content materials (mailed before and in between training sessions). The training in all systems maximizes time, however, and there is a great

deal of cognitive input during a short time period. The PETC graduates acknowledged this problem and gave several instances of their "aha" or "eureka" experiences *after* the training event which led them back to their materials.

Conclusion

In its totality the Review Process was an exciting and productive interchange between individuals; the reviewers' commitment and ingenuity in maximizing their available resources and the willingness of the PETC program staff to openly share their knowledge about their perceived strengths and weaknesses of the system provided a forum for intelligent and critical discussions and review.

Review of the PETC Program

Dr. Bunyan Bryant
October 23, 1975

The series of programs designed to train educators with high level skills in organizational development was relatively well done, highly integrated and professional. It is evident that much forethought and energy went into the conceptualization and integration of these training materials; the nature and organization of such materials clearly indicated that they were designed to train those involved in school related organizational problems. To date, little has been done in viewing schools as organizations that are unique and crisis-ridden. Traditionally, the underlying structural assumptions of educational institutions have been treated as less important than isolated individuals or groups located within the organization itself. Too often we explain organizational concerns in terms of a particular individual's withdrawal of emotional support from organizational goals and objectives, instead of the institutions' contribution to alienation and nonproductivity of its members.

The rationale for preparing organizational development specialists is both sound and much needed. The PETC system trains educators in OD to provide school managers with appropriate skills or resources at costs most reasonable than hiring external consultants. However, the rationale for providing OD skill training to school managers assumes that they are interested in using the technology to enhance humane aspects of quality education. Often the preoccupation with student control rather than improved education becomes the issue. Therefore, it is important to train not only school managers or teachers, or students, but certain types who

are interested in using the skills in ways that the designers of the training packages feel appropriate. Perhaps training students, teachers and administrators to serve as check points for each other may be worthwhile considering.

The training materials presented provide both logic and clarity with respect to instructional objectives and planned activities. Yet one has to be conscious of potential biases that are inherent within the system. For instance, the designers of the training materials referred to therein were probably white-affluent-male-adults, who were products of western culture and who were politically or culturally insensitive in conceptualizing interventions for social justice. Few references within the PETC programs were made to minorities or women--nor were there training designs by such groups. In addition, some of the designs particularly in PETC-I have been around for some time; they do not take into consideration the issues of racism, ageism, sexism, classism and ethnocentrism. Although well intended, the PETC programs may set the conceptual or theoretical framework for skillfully supporting or maintaining deep-seated cultural patterns. Even minorities often fall prey or implicitly agree to this conceptual or theoretical framework that is not always in our best interest. Yet it is unfair to "lay" this on the PETC system. Such issues are raised not to browbeat traditional white male consultants or the PETC programs, but to raise the level of consciousness. White males have had a tremendous impact upon all those involved and few attempts have been made to look critically at the shortcomings of well-established OD models or their uses.

The above issues are important: multiple forms of injustices are found at every level of the school fostered by complex organizational arrangements or personal or cultural or stylistic ways of behaving that

maintain majoritarian codes of conduct. An index of measuring the amount and extent of oppression found within the school is to diagnose how the school treats its students, women, minorities, and ethnic groups. In order for PETC to become more socially significant, it must become more sensitive to issues of social justice and involve minorities and women to more equally share the technology. This is a first step in addressing the biases that may be found in the "crevices" of the conceptual designs and their uses.

Although social justice issues were never outrightly disclaimed, the designers of the training programs clearly stated that the PETC program was not an encounter group, nor a sensitivity training group, nor did completion of the program necessarily qualify one to consult with organizations, nor was it appropriate for "pathological schools." The designers of the system claimed to be able to train people to do effective OD work in certain schools depending upon the school's profile and readiness for change. However, it was interesting to note that one of the graduates felt that PETC could be used regardless of the condition of the school. The evaluator, however, tends to agree with the designers in that there are certain schools where the PETC program would be less than adequate.

Based upon the above, it is recommended that: (1) PETC pay particular attention to racial and sexual biases of training models that are in use or change them if appropriate; (2) PETC select more minorities and women and students so that they can gain access to technology as a means of a strategy intervention that begins to deal with issues of social justice in schools; (3) PETC make a conscious effort to include or design other training models that deal with the issues of social justice and state how present models can be misused in subtle ways to more adroitly support oppression.

PETC target population raises the issues of social justice too. At one level the target population is fairly clear, but at the level of radical and sexual composition it is not so clear and needs to be dealt with more explicitly. In fact, high school students, too, should be a part of the target population, even though they are involved in some of the more basic programs. Often as adults we feel too threatened to learn from students; working through and learning how to deal with such feelings could be an important part of the program.

In spite of PETC shortcomings, it is probably one of the best conceptual and integrative organizational change and development pieces to date. As mentioned before, much forethought and integration and work has gone into its development, as indicated by its clarity, purpose, and organization. The need for this kind of training package is long overdue as indicated by the school's victim-blame approach to academic failure. Even though issues listed below are not specifically taken up in PETC, it is important to ask questions such as: (1) what kind of skills does one need to work effectively with oppressed groups; (2) is one always accountable to school management or can one be accountable to students rather than management. The questions listed above are important and should be dealt with more thoroughly.

The PETC system was clearly organized into a meaningful whole, integrating skills, theoretical concepts, and activities that went from simple to more complex. One graduate from the program stated that more skill-building could have gone on in RUPS in preparation of PETC-I, but was not a major problem. PETC-II builds off of PETC-I with some appropriate duplication of skill-building. The last program in the series raised some issues such as: (1) too much information to be digested and understood within the context of the training experience, (2) a clearer definition indicating the

differences between theories, conceptual models and hypothesis, (3) more time to deal with multiple organizational development models within the training event, and (4) an improved start-up design to help support those trainees with issues of strategy intervention.

Throughout PETC the trainer provides learning situations for the trainees, in fact, places a value upon this kind of learning. In PETC-III the trainer takes a more active role in disseminating information along more traditional pedagogical lines, but the training provides few visions of new schools or visions for ideal organizational change and development outcomes, or visions of a sexless or raceless school, or visions of a system of accountability of teacher and administrator to students or parents. Yet the consultant or trainer is constantly attempting to influence diagnosis and organizational outcomes. It seems that the consultant could also influence school systems to experiment or adhere to organizational structures that would be more accountable to and rewarding for organizational members. Without visions of new schools, PETC is deficient and places the consultant at great disadvantage with respect to influencing certain kinds of organizational change and development. There are some schools around that could serve as models even though few deal with large groups of student, teacher and administrator populations.

Will all this lead to successful consultation? This question is difficult to answer in that it really depends upon who decides success, i.e., the adult culture of the school or consultants, or students. There may be situations where the adult population of the school perception of success is at variance with the student perception of success. Traditionally, the adult culture has constantly defined success in terms of academic achievement rather than student satisfaction. The point can be most cogently

illustrated by the PETC part of NWREL. Does an external evaluator define success by applying statistical analysis to behavioral outcomes or do trainers of the PETC program define their own success in terms of personal satisfaction reported by trainees? Often those who have the power will determine the criteria, method and success of stated goals and objectives. Yet many policy decisions have been made in the absence of quantitative data; we have to decide whether scientific technology transcends or subordinates itself to educational values.

What about negative or positive side effects? With respect to the former there are several negative side effects that could result from a system. These are: (1) using the technology to skillfully maintain racism, classism, sexism, ethnocentrism, (2) using the PETC system without fully developing the necessary skills to consult to school systems, (3) disseminating the technology in ways that do not involve oppressed groups so that they may not be able to defend themselves against its misuse, (4) using the PETC system in ways that foster dependency of the client upon the consultant, (5) using only parts of the system or the various training programs out of context, and (6) focusing on this model at the exclusion of alternatives. Some of the potential or positive aspects of this training mode were: (1) including or juxtaposing training designs to deal with the issues of multiple oppression, (2) disseminating materials or training minorities, women and students to more effectively deal with rancorous school conditions, and (3) using PETC materials to change the curriculum in schools of education. These are some of the major side effects that could come from such a program. Other side effects are involved in the role of the consultant or trainer.

There is little indication that trainers are aware of their partisan or political role within a participant group. It is more than trainer biases but the "political correctness" of the trainer with respect to strategy interventions at the group or system level. Too often we are taught to recognize our biases and encouraged to be value neutral and objective. Often the difference between a trainer or consultant and an advocate is that the former usually has a contract with established power (and whose partisanship is more supportive of), while the latter usually has a contract with nonestablished power (and whose partisanship is more above board and more supportive of). Clarity of these issues is important to trainers and graduates of PETC.

Why raise questions of social justice within the context of this evaluation? Not to raise such a question would be an injustice to the evaluation and it might encourage those in the PETC system to continue to circumvent the issues raised herein. We cannot afford to do that. The increasing rise of technocracy, the unequal distribution of wealth and power, the high rate of unemployment and underemployment among the poor, the elderly minorities and women, the loss of faith in many of our government incumbents, the corporate influence on our professed democratic process, the historical relations of exploitation of the third world leave many students and the disenfranchised frustrated, confused, and alienated. Contradictions in our history or democratic life or the free enterprise system are visibly disturbing. Often students distrust those who are the personification of policies and values that produce alienation and despair. It is clear that the school does not operate in a vacuum and the macro forces of society have a tremendous impact.

Obviously, it becomes important that consultants seriously consider their values, goals and constituencies, roles and stylistic behavior. Those "trapped" in esteemed hereditary roles and socialization may more often opt to serve establishmentarians. Those who are interested in new consciousness or new training interventions will have to begin to understand more fully the macro economic, social, political forces that perpetuate or exacerbate social injustices. Such an undertaking will undoubtedly require personal risks, time, retraining and improved conceptual theories. But let's not get hung up on the latter or as Martin Luther King said "paralysis of analysis or unnecessary head scratching and plunge in wholeheartedly." The conceptual design of PETC can be helpful, makes an important contribution to that process if used "correctly." It is important to get such information in the hands of those interested in gearing up for social justice. In spite of the shortcomings of PETC, it does make a major contribution to the field in training individuals to do organizational change and development work in schools. What we need to do is to continue to build off these conceptualizations and make changes where necessary and watch out for potential biases that stifle rather than facilitate personal or academic or organizational change and development. This we can do.

(No alternative was received.)

Review of PETC I, II, & III

by Ann M. Burr

The rationale for the PETC series is very clearly presented in the Central Ideas Book that accompanies PETC III. The idea that planned, dynamic change is possible and that it will be the result of the use of these three programs is a stimulating one. As an educator I readily accept the need for such change and agree that the task is enormous. The goals of each program are also well defined and presented in a way that makes sense to the reader.

I have no quarrel with the idea that people need the skills of understanding relationships, of seeking change, and of dealing with complex technology. These are indeed socially significant. I am uneasy, however, with the unintentional outcome of the three programs--that not all people have equal access to the training. This, too, is socially significant! Because the programs are designed for specific populations who have positions of leadership, who have extensive previous training, and who have the time and resources to take advantage of PETC, trainees will largely represent Establishment--particularly white males. With intentional effort to recruit women and members of other races, and with some plan of financial assistance, this discrepancy could be corrected.

The claims and disclaimers are explicitly stated, particularly in the Central Ideas Book. The emphasis on the limitations of training in PETC I and II (that participation in the programs does not prepare an individual to be a trainer for the programs) is clear.

The authors had the target populations well in mind (except for the exceptions mentioned previously), and they are clearly presented in charts and in the text. I have a personal bias about limiting opportunities for training to the specified people in a particular role. I would not exclude any school or community personnel from entering the training, assuming that

the content and purposes had been carefully outlined to each person and that he or she accepted the responsibility for his or her learning. This, however, could be done by the implementers of a program; it is not the specified intention of the authors.

The content of the three programs is impressively concise and clear, yet outstandingly comprehensive. I have developed some minor learning packages for classroom use, and I can appreciate the many hours represented--hours of writing, trying out programs, and rewriting. In my opinion the programs will do what they say they will do--train a person to be an Educational Training Consultant with many skills and knowledge of their use. It is made clear that these skills do not include training in human relations workshops, but the materials do not state a recommendation that such training would be helpful or necessary for a truly competent consultant. I suggest that such a statement be included somewhere in the materials, perhaps as an addition to the section on prerequisites and limitations in the Central Ideas Book and also added to the requirements sections in introductions to the various programs.

The concepts are based on sound learning theory--that learning is most effective when the learner is actively involved, when he or she is given immediate feedback on actions, and when the learner is a voluntary one. There is another facet of learning research that shows that a person learns most effectively when he or she is involved in the design for learning and has some choices offered in ways of attaining a goal. A program designed to be taught by a fairly untrained person--such as the IPC and RUPS programs--has to restrict choice, but I'm wondering if the Senior Trainers in PETC II and III could involve the participants a bit more in the plans for their own training. This comment stems from statements made by some graduates that the material presented in PETC III was a conceptual overload. It is possible, though, that this problem has already been taken care of in the sending out

of materials in considerable advance of the actual first workshop of PETC

III. I would still recommend that Senior Trainers make an effort to introduce the programs in such a way that participants feel included in the planning and not "done to".

None of the graduates that met with us complained that the material was too wordy or irrelevant, and in my review of them I found no instances of such. The references are sound, the exercises are appropriate, and the sequence of activities appears to be logical. There is no doubt in my mind that the trainees will find their training practical. The best of all worlds for an educator is one in which he or she can actually apply techniques in a "back home" situation. The graduates assured us that the techniques do indeed work.

For the most part the material contains a minimum of sexist structure. However, on page 1 of the Central Ideas Book and in the Introduction to PETC III: Organizational Development Training, there are statements describing the consultant as "He" and the practices as "his." I would strongly recommend changes in all such instances! I also object to the tendency to refer to classroom teachers as female and administrators as male--as Ms. Jones in the RUPS package--but I will try to confine my remarks to the PETC Programs.

The training procedures in all the PETC packages seem entirely appropriate since they are meant to be used in a specified way. The role of the trainer, too, is explicitly outlined and deviations are certainly not encouraged. For me, such a method would become untenable. I find that I can only perform instruction the same way once or possibly twice; after that, I add or subtract or change methods readily. This is a personal preference, and is significant only for possible trainers who have similar preferences. If a trainer felt the need, he or she could certainly change some of the sequences and, in my opinion, the results would be comparable.

There are many positive side effects that could come from use of the PETC systems. Change would be planned ones that came from within the organization. Clients would receive assistance in a variety of ways, not just one "tried and true" method. The plans for change would include input from various members of the organization and would be based on internal goals. A side effect from all this would be that members of the organization would feel included; they would also feel proud of the results.

An unfortunate side effect of the system is that minority groups may feel even more alienated, since the leadership represents the establishment. It is possible, too, that the Consultant has been trained without sufficient self-awareness of a personal nature. Even more likely, though, is the situation in which the hidden, subtle problems remain unsurfaced because the PETC graduate had little training in awareness of issues of social justice--issues which can be unintentionally perpetuated. The addition of some current social issues into the PETC material would be crucial!

From my own experience in the classroom and from the comments of the PETC graduates, I am sure that the concepts presented become really learned information through teaching them to others. This is not a given in the last two packages. I see no way around this, except that by being a cotrainer a graduate could then solidify his or her theoretical constructs by being a Senior Trainer.

These programs can, with the few additions mentioned, be of tremendous value to organizations that are aware of problems and have no trained internal consultants. They have been carefully and skillfully constructed. Congratulations!

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

Title	<u>Handbook of Organizational Development in the Schools</u>
Author	<u>Schmuck, Richard and Phil Runkle, et al.</u>
Publisher	<u>Mayfield Publishing Co., Palo Alto, 1971 revised</u> (soon to be)

Why did you choose this system?

First of all, I'm assuming the client system to be a school district, and I would suggest merits of this system and those of PETC. The school district, then, would make a decision.

Dick Schmuck's method of developing a series of cadre of internal consultants provides a feasible alternative to the PETC programs because:

- (1) the costs are lower,
- (2) the installation time is shorter,
- (3) the resulting consultants represent all levels of a school's population, not just management, and
- (4) a wide variety of changes are possible within the first year.

This "Cadre" would use materials described in the Handbook, plus other materials, to train others in the school district. Their original training would involve the cost of external trainers (as would that of a PETC Program) and whatever costs of internal training of the Cadre required to bring in new members...or new ideas...during the first year. The PETC Programs require external consultants as each program is introduced during a three-year period.

Cadre activities are geared so that students are involved (IPC, RUPS, etc., can be used this way, too, with modification) and can become trainers. This is also true of custodians, cooks, secretaries, parents, teachers, plus administrators; PETC tends to be useful only for administrators or personnel, such as counselors, who have no classroom assignment or classified job.

Cadre training includes methods and materials to encourage personal growth as well as professional competency.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM		Internal Cadre
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES	
COST	Initial investment includes a package that can be reused many times. Trainees would most likely include personnel who do not need paid substitutes.	Initial investment is large (cost of packages plus cost of trainers and trainee-time).	Initial investment does include packages--does include trainer and trainee-time cost.	Trainee-time costs could be large because trainees include certified and classified personnel who might need release time.	
WORKSHOP FORMAT (including ease of implementation)	Planning time for trainers is likely to be less.	Less opportunity for suiting workshop to specific needs.	Opportunity to design, with participants, a workshop that is flexible in length and format. Planning time becomes a learning situation.	Planning time is likely to be lengthy.	
MATERIAL CONTENT	Well thought out. Concise, comprehensive. Evaluation data available.	Somewhat restricted (this depends upon the trainer and his/her expertise).	Wide variety available. Well-thought out. Comprehensive, concise.	Material has to be pulled together from available files. Previous evaluation unavailable for specific design.	
PROBABLE SHORT-TERM EFFECTS	Skills of system's personnel would be enhanced the first year. Problems in classrooms, work groups, and schools could be dealt with...in the first year. Introduction of skills would be thorough.	Progress (assuming that the IPC, etc., were begun as basis for PETC) would be spread over a three-year period.	Skills of system's personnel would be enhanced the first year. Problems in classrooms, work groups, and schools could be dealt with...in the first year.	Trainer-time would be heavy during short-term.	
PROBABLE LONG-TERM EFFECTS	Change could be instituted in a district system within a three-year period of time. The trainers are highly skilled (PETC-I, II & III are completed).	Trainers still needed as PETC packages are introduced. Highly skilled trainers are probably few, and all from management.	Change could be instituted in district system within a one-year period of time. Trainer-time very small. Internal people take over. Trainers include students, principals, parents, etc.	A variety of skill level existant in Cadre; 4 or 5 new people coming for training each year.	
USEFULNESS TO CLIENTS	School district can count on help from skilled consultants and depend on many personnel being skilled in communication, problem solving, decision-making, and conflict management.	Change may not have involved efforts of all levels of school people. Change may be minimal from point of view of students and parents.	School district can count on help from skilled consultants and depend on many personnel being skilled in communication, problem solving, decision-making, and conflict management.	Change may be more revolutionary. Change may have been based on various models some cognitive, some affective.	

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC	OTHER SYSTEM
<u>COST</u> ☒ Reasonable ☐ Somewhat Reasonable ☐ Prohibitively Expensive	<u>COST</u> ☒ Reasonable ☐ Somewhat Reasonable ☐ Prohibitively Expensive
<u>WORKSHOP FORMAT</u> ☒ Well-organized ☐ Parts were Organized ☐ Poorly Organized	<u>WORKSHOP FORMAT</u> ☐ Well-organized ☒ Parts were Well-Organized then brought together. ☐ Poorly Organized
<u>MATERIAL CONTENT</u> ☒ Comprehensive ☐ Adequate ☐ Superficial	<u>MATERIAL CONTENT</u> ☒ Comprehensive ☐ Adequate ☐ Superficial
<u>USEFULNESS TO CLIENTS</u> ☒ Useful ☐ Somewhat Useful ☐ Not Useful	<u>USEFULNESS TO CLIENTS</u> ☒ Useful ☐ Somewhat Useful ☐ Not Useful

Which would you recommend your client system select?

☐ PETC first and then

☒ Other System

I would recommend the Cadre system because it offers people an opportunity to be involved in the changes that happen to them. PETC Programs, as now written, result in the Consultant role being a management position.

Review of the PETC Program
(And Comparative Analysis)

Gene Mulcahy, Ed. D.
Oct. 23, 1975

I. Review of the PETC System

The structure of this section of the review is three-fold. The first section is a consideration of some of some of the factors in the review itself and in the review process with the attendant implications of threats to validity. The second section is a delineation of perceived strengths and weaknesses in the program and the third section is a specific response to the expert review guidelines as conceived by the program's evaluator.

Section 1: The Review Itself

The four reviewers over a period of four days had some significant advantages as the task of the review of the PETC program proceeded. One such advantage has been the availability of resources, including developers, evaluators, graduates, some statistical and evaluation data, and access to program developmental administrators. The processes of selection and congregation of the reviewer group would seem to have been effective in that the group was a collection of people balanced from the perspective of a number of identified variables. The differences in the members of the group provided unique perspectives and insights into the tasks assigned and yet the group itself functioned in a most compatible and constructive fashion with the group's own process and data sharing sessions being of great value.

Serious effort was made by the PETC development and evaluation staff personnel to meet reviewer needs. This included a high degree of commitment and energy to support and facilitate the reviewer tasks. The dialogue throughout the review between the reviewers and personnel connected with the PETC development program, and graduates of the PETC system has been honest and open. All interviewed displayed a non-defensive posture and an earnest effort to respond to reviewer query.

There have been, however, some ongoing difficulties with the review and the review process. The most serious difficulty for us was the magnitude of the materials to be reviewed and the relatively limited time in which to review them. The materials themselves, physically occupy an 8" x 12" space several feet high. To expect us to provide a sensitive reading, synthesis, and analysis of these materials in the time offered, was an unreasonable expectation. We have sought to achieve the task none the less, and designed processes for the maximum possible access to information in minimal time.

Likewise, some resources were not available, and some sources were accessible only for limited time. Because the long term evaluation process is in a continuing state, much of the data we perceived as desirable, was not yet available.

Given the limitations placed upon the reviewers, the value of the review itself is limited as a source of major influence in decision-making relative to further development in the program. This caveat, however, does not apply to some of the philosophical, social, and value issues raised.

Section 2: Strengths and Weaknesses of the PETC Program

Strengths

- Comprehensive
- Organized and integrated
- Humanistic
- High quality of material contained
- Emphasis of practicum
- Reasonably skilled people can be trainers
- Has early opportunities for practicing skills
- Includes a design for supervision
- Emphasis on understanding process
- Selection of consultant practicum experiences allows for trainee choice in areas of interest and style
- Well designed, offers support and structure
- Opens up trainees to research
- Offers a planned way to affect change
- Provides powerful tools
- High degree of clarity and integration of materials
- Use of groups and devices for trainee interaction
- Understanding of the value of conflict in growth
- High degree of structure, in some senses, extends the opportunity for choice and protects the risker

Weaknesses

- Does not address concerns of social justice
- Seeks to be value neutral
- Culture bias
- Elitist
- Phrased in sexist language
- A system based upon materials, rather than people
- Cannot utilize resources as they appear
- Trainees are in some ways expected to have white-middle-class values and experiences
- Trainees expected to be "system oriented people"
- There are no criteria for determining equivalency
- Weak on behavioral objectives
- Evaluation of behavior change not sufficiently well-developed
- Evaluation of consultant competency after graduation not sufficiently developed
- Client system groups are sometimes exploited
- Client system groups are sometimes artificial
- No process for assisting client systems to define needs and effectively use consultants
- Entire system lacks trainee needs assessment for training component
- No pre-assessment of skills or skills level
- Weak in the affective domain
- At some points, trainees report confusion relating to their not understanding the total system and relationship of parts thereto

- The time allotted for the program may be insufficient for the material to be learned
- In PETC I practicum there is no visible means of dealing with incompetent and unprepared leadership problems except for the co-leadership model
- Sometimes the timing of the introduction of new materials seems inappropriate
- The package is not open to in-flight correction by trainees
- There seems to be a need for a better overview of the total package

Section 3: Responses to the Expert Review Guidelines

No. 1: The merit of the rationale and goals of the PETC series:

- a. Clarity: Although there seems to be some difficulty in the trainee's perception of the various parts of system as he or she proceeds through the system, the program itself evidences a great clarity of the total. This clarity is one of the most impressive aspects of the system. The PETC training system is like a carefully and delicately woven tapestry. Its remarkable and clear design is evident in its total. It has been artfully and lovingly constructed with a high degree of technical competence.
- b. Logic: The sequential conceptions follow a consistent and logical pattern. The introduction of concepts and practice of that concept is generally highly appropriate and constant. A comprehensive, humanistic organizational development and change strategy has been devised and presented with painstaking care according to well-reasoned sequences.

c. Social significance: It is in this area that one of the major difficulties of the program lies. The PETC system does not concern itself with the issue of values. It seeks to be value-free and equally applicable to all client systems. It ignores the fact that many systems are by goal and practice, unjust.

One primary client of the PETC system is the American public school, and yet the American public school is designed to offer the tools of success to the privileged, thereby enforcing oppression on ages, sexes, race and classes not included.

The school and the society with which it is interdependent are at base supportive of an elitist minority. The important changes we are compelled to consider in America are basic changes in the social stratification, the access to information, and the availability to tools to a total population. The PETC system can be used effectively to support the racist, sexist, ageist and classist goals of the society at large and its educational system.

Consideration of these social, ethical questions of reform and revolution is not forthcoming either in the rationale or the design of the program. The fact that the materials in the programs themselves show consistent evidence of sexism in language is a further

support to the lack of consideration and concern in the development of the program for these vital social, political and cultural issues.

Johnathan Kozol, in his criticism of the free school movement and philosophy, suggested that this nonsystemic system of learning was analogous to the purportedly amoral behavior of German people of good will during the Third Reich. He suggested that these schools would peacefully build their birch bark canoes in the black forest while the Nazi ovens functioned a few miles away. The development of amoral products in education and the PETC product in particular, because of its value, is capable of functioning in a moral vacuum.

Another issue related to social significance is the failure of the PETC system to deal with the issues of affective growth. Clear behavior objectives should be established and processes designed to bring about an affective growth component in the program.

- d. Claims and Disclaimers: The claims and disclaimers in the program are clear and well stated. The program, in fact, is somewhat humble in its claims. The potential and actual, in the package, transcends the claims made for it. Disclaimers have been appropriately stated.

No. 2: Identification of target populations:

There is a clear definition of appropriate target populations for the various components of the PETC program. The success of this identification has been verified by the fact that a high percentage of PETC graduates are in fact engaged in organizational development consultation work.

The difficulty, again, is a social problem. The assumption in the determination of target populations is an assumption that the consultant will be a well educated person with middle-class white values of some financial means. This assumption is a key determinant in the identification of target populations.

There is no consideration in the program for the fact that the appropriate organizational development consultant in a situation may be a student, or a black parent, or a member of the community not skilled in the jargon and concepts of the educationist. The program, then, can be guilty of establishing a consulting elite of the same class and values as those purported within the social and educational system. This condition mitigates against change and reinforces the racist, sexist, ageist and classist bases of the system.

No. 3: Content: Skills, concepts, principles, values and issues

- a. Conceptual adequacy: The system has developed a humanistic and comprehensive organizational development strategy which is unique. The concepts work effectively,

both apart from and together with each other. The use of the practicum to reinforce the principle is impressive. Although we had no opportunity to observe it on a functional level, it is an excellent means of teaching, practicing and reinforcing learning.

- b. Theoretical significance: The system is unusual for its humanism and insight into systems and strategies for changes within systems. It is a structured program supporting a fair amount of freedom and choice within the structure. In some senses, it is not sufficiently close to its own consulting design. It does not in its own design follow the principles it recommends to its trainees for the development of their own consultation designs.
- c. Practical significance for successful consulting: A wide range of skills are made available to the consultants through the program. These skills can be employed in an impressive range of ways and in varying situations. The program effectively teaches these skills. Graduates report that they have used the skills taught and find them highly satisfactory in their consulting work.
- d. Empirical justification for consulting practices: The project has apparently not had the resources available to it for testing to the level of significance desirable in creating empirical justification for the system itself. Two further developments are required: (1) a further effort to determine client satisfaction with the

consulting skills of graduates. (This involves the continued use and monitoring of logs and instruments of evaluation on a consistent basis.) (2) Further sophistication of measurement instruments in their application to determine behavior change in graduates and in the client systems they serve.

- e. Clarity of definition and presentation: The PETC system maintains a high degree of clarity of definition and presentation. Descriptions are simple, straightforward and clear. Rationales are clearly and simply stated. The transition from theory into practice should be consistently and efficiently achievable. The training system can be affected by reasonably skilled trainers and does not require highly technical and highly skilled instructors and supervisors.
- f. Appropriateness of content elements: Based on the insufficiency of this review, a single reading of the PETC materials and a cursory reading of some of the other segments of the total package--content seems appropriate and useful. The product combines the careful presentation of researched exercises and new materials, all are combined in a consistent and helpful manner.
- g. Integration of content elements: Both from the reading and the testimony of graduates, integration of the materials seems well developed. The lack of preassessment instruments and a systematic means of determining trainee skill level and equivalency remain a problem.

- h. Parsimony: Some graduates feel the total program should extend over a longer time because the quantity of the material commands this. The decision of the time, of course, is the individuals. If more data on the total concept and program in a more articulate system of self-monitoring were designed, that decision would be made with better data.
- i. Sufficiency: The package is a comprehensive and articulate skills design. Adequate concern for issues of social justice and affective growth is absent.

No. 4: Appropriateness of PETC-II procedures

One of the very impressive things about the PETC-II materials is the clarity of definition of the role of the consultant and the definition of the parameters of the consultants' responsibilities. One deficiency in the PETC-II system is the potential for exploitation of client system groups and the possible artificial nature of those groups used as a training device. The identification and definition of these client systems is a skill requiring extraordinary sensitivity on the part of the trainer or senior trainer and is a serious potential weakness in the system.

Another potential difficulty in the PETC-II program is the entry into consulting relationships. The program does not seem to offer sufficient support and investigation of the difficulties in establishing client relationships. Neither is there sufficient concern given to the development

of strategies for client system readiness in the effective utilization of a consultant, a role of the consultant him/herself.

Finally, a reading of the system absent from an observation of its practice suggests potential difficulty in the trainees moving from concept to intervention. It is not clear how this movement is made and what supports and supervisions are available to the trainee in making this leap.

No. 5: Clarity of trainer expectation

This is an area of strength in the program. The function of the trainer in PETC-I and PETC-II is that of facilitator. The trainer is clearly expected to facilitate individual growth and group growth in training skills. In PETC-III it becomes very clear that the role of the trainer changes, becomes more judgmental and more instructional in the presentation of the content ideas toward the philosophy of organizational development and a strategy for implementation.

This change of style leads to the question of the credentialing of trainers and the delineation of skills trainers might be expected to possess. Graduates who have been trainers reported great difficulty in the development of criteria for trainers for PETC-III. Therein, may be a problem for the system, for the PETC-III trainer must have an extraordinary ability as an organizational development theoretician and practitioner. The trainer in this third system should be the kind of super person with extensive

background in organizational development consultation which the program avowedly seeks to avoid. Indeed, the very quality of the description of the role in its dimensions makes the identification of the appropriate trainer a matter of great difficulty.

No. 6: Positives and negatives

Responses to this question and to the succeeding one are implied in the section of this review entitled "Strengths and Weaknesses." From a technical product perspective there are no serious negative side-effects perceivable, except for the possible negative side-effects relating to premature group leadership responsibility in the second week of PETC-I. The difficulty perceived in this review is the political, economic and cultural difficulty expressed in response to several of the queries. This problem and the attendant amorality of the system is the most serious problem encountered. Unless some solution to that problem can be designed into the system, then the system itself may be both very valuable and potentially very dangerous.

The problem suggests the dilemma of Albert Einstein expressed in his famous letter to President Franklin Roosevelt. He created that thing with his genius which he believed would be of benefit and help to the entire world, yet he correctly perceived that the use of the precious gift of his intellect and insight was in a destructive fashion. Unless it is possible in some way to revise the

system so that the issues of social justice are clearly addressed, then the system itself fails in its goal to facilitate organizational, developmental consultancy for change.

II. Comparison of the PETC System with Another Organizational Development Training System

The system selected for comparison with the PETC program is one which is based upon a somewhat different set of assumptions. First, these assumptions will be delineated, then the system will be described and finally a comparison will be offered using the descriptors designed by the PETC evaluator.

Section 1: Organizational Development Consultant Training Package Assumptions

1. An articulated program of trainee role definition and needs assessment must precede a training design.
2. Clear behavioral objectives must be established by trainees and trainer prior to designing the training program.
3. A trainee designed training system responsive to trainee identified priorities is an effective approach to organizational development consultant training.
4. A comprehensive training program should include training in resource development.
5. Internal and external resources should be used in the training program.
6. If the trainees have ownership of the design, choice about the direction and control over "inflight" correction possibilities

in the training system, then investment in the training experience itself will be high.

7. The skills of ongoing personal and skill growth should be taught as part of the training system.
8. An organizational development consultant training package in contemporary America must place emphasis upon the burning issues of social justice which are key issues for the school and for the society with which the school is interdependent.
9. A successful training program must not be terminal.

Section II: Description of the Program

The training program proposed is a trainee/trainer self-designed program. Its dimensions will differ with differing groups of trainees. The design seeks to emulate the function of an organizational development consultant when functioning in that proper consulting role. It begins with an assessment, flows through to the development of behavioral and skill objectives, to the development of a design to meet those objectives, to the active involvement in the self-directed training design, and, finally, to the measurement and evaluation placed upon the priorities established.

The training package, then, will be different each time applied, dependent upon the style and priorities of trainees and trainers. A wide variety of materials, many not dissimilar from the PETC materials, would be developed as resources to the trainee and trainer groups. As the trainees proceeded through the program, they would gain greater awareness of the materials developed and the potential of those materials

in functional contacts. Materials in individual learnings would be applied in practicum situations and evaluated. Trainee performance in these situations would be carefully evaluated and supervised by trainers and other trainers.

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

Title Organizational Development Consultant Training Package*

Author _____

Publisher _____

Why did you choose this system?

*NOTE: This comparison was written on a hypothetical product. A more complete discussion of this description is given on pages 174-176.

2. Please list the strengths and weaknesses of each system below in terms of the categories given.
Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST	Efficient trainer/trainee ratio	Too expensive for poor people	Efficient trainer/trainee ratio Training materials are of continuing value	May be too expensive for poor people Reasonable cost for establishment people
WORKSHOP FORMAT (including ease of implementation)	Clear	Sometimes rigid	Highly flexible Based on needs assessment	Requires higher degree of trainer skill and decision making
MATERIAL CONTENT	Constant and able to be supplemented	Perhaps overwhelming	Constant and able to be supplemented	
PROBABLE SHORT-TERM EFFECTS	Increased OD skills	Graduates may not be functioning as OD consultants	Increased OD, personal and perhaps political skill	Inavailability of some resources due to immediacy of need
PROBABLE LONG-TERM EFFECTS	Provides rich material for long-range and varied use	Does minimal affective growth	Includes ongoing self-activating design	
USEFULNESS TO CLIENTS	Broad overview and comprehensive system	Not based on self-defined needs assessment	Meets self-defined needs	May omit some important material

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC			OTHER SYSTEM		
<u>Cost</u>			<u>Cost</u>		
☐	☐	☒	☐	☒	☐
Reasonable	Somewhat Reasonable	Prohibitively Expensive	Reasonable	Somewhat Reasonable	Prohibitively Expensive
<u>Workshop Format</u>			<u>Workshop Format</u>		
☒	☐	☐	☐	☐	☒
Well-organized	Parts were Organized	Poorly Organized	Well-organized	Parts were Organized	Poorly Organized
<u>Material Content</u>			<u>Material Content</u>		
☒	☐	☐	☒	☐	☐
Comprehensive	Adequate	Superficial	Comprehensive	Adequate	Superficial
<u>Usefulness to Clients</u>			<u>Usefulness to Clients</u>		
☒	☐	☐	☒	☐	☐
Useful	Somewhat Useful	Not Useful	Useful	Somewhat Useful	Not Useful

Which would you recommend your client system select?

☐ PETC

☒ Other System

Review of the PETC Program

Bonard S. Wilson, Ed.D.
Leadership Institute of Spokane
Oct. 23, 1975

1. My opinion of the merit of the rationale and goals of the PETC series:
 - a. Clarity: It seems to me the goals of the programs lack clarity, or perhaps, specificity would be a better term. They are couched primarily in instructional terms rather than in behavioral terms. Consequently, they are less effective in giving direction to the training and in serving as guides for evaluations.
 - b. Logic: I see the logic behind the objectives as being sound. The concern I have is that the whole series is in a very logical order--each step following the other in a well considered logical sequence to the point that it cannot be altered to fit a psychological order that may be quite different from the logical order.
 - c. Social significance: The goals are socially significant, in my view, as far as they go. They do not directly address themselves to some of the social issues of our times, in particular the ones of social justice, sexism, racism, ageism, etc.
 - d. Claims and Disclaimers: Most of the claims and disclaimers have been made explicit, as I read them. However, it seems from the evaluations that a lot of participants have difficulty understanding these, so perhaps these need to be made more explicit, somehow. We were given verbally some disclaimers that were not included in the program and I would suggest that these be included somewhere.
 - e. Recommendations: Objectives and goals should be stated in behavioral terms and the same objectives be used for guides in the training and for evaluating. It seems now that goals of the program are stated in instructional terms and the goals used for evaluation are stated

- e. (continued) in instructional terms and the goals used for evaluation are stated in behavioral terms. I see confusion resulting from this.
2. Target Populations: The target populations have been clearly identified in each of the programs. I would like to see the targets include students, minorities among the targets now identified, and to include all personnel of the school system--janitors, bus drivers, parents, etc.
3. Merit of the content of the instructional system:
- a. Conceptual adequacy: The concepts are adequate as far as they go. I especially like the experiential approach and the idea that this is only the starting point. It seems, however, that the concepts come primarily from white males and are in accord with the concepts generally accepted by the school establishment. Also, the concepts support a medical-model approach to consulting rather than the one I see as being more appropriate in which the client is allowed to remain responsible for his own behavior and is given help by the consultant to assess his needs, to plan corrective actions and to devise ways to evaluate his/her own progress. The concepts underlying the role of the trainer are of the medical-model, also. If a trainee discovers that he/she has needs not covered by the content of the workshop, it is seen to be best that he/she drop out of the workshop, rather than alter the "treatment" that is prescribed by the program and the trainer. I would like to see a program based upon the non-directive approach.
- b. Theoretical significance: The theories upon which these programs are based is significant theory in the behavioral sciences. The force-field analysis, the use of consultants, the use of internal consultants, and the training of consultants, for instance, are supported

- b. (continued) by valid and significant theories. It seems to me that the significance of the theories and the solid underpinning provided by these theories is a very strong part of the series. I would like to see more content that is based upon other theories of change and change agency, however, especially non-medical model approaches.
- c. Practical significance: The content is well designed to prepare consultants to perform the tasks they are being taught to use with the exception of content in the affective areas. The question of values of the trainees, their concept of persons, their concept of schools, how they feel about themselves and about each other in the training is left pretty much up to being dealt with indirectly. Unless the person had this content before he entered the series or went elsewhere to get it, he would be inadequately trained for implementing the rest of what he learned. The skills learned in the series are probably inadequate for consulting in a situation where social injustice was at the core of the problems. The content, naturally, does not cover other approaches that might be more appropriate in some situations.
- d. Empirical justification: There is plenty of empirical evidence that the content is justified for training people to do the consulting that it is hoped they will do when they finish the series.
- e. Clarity of definition and presentation: I am impressed with the clarity of the material and of its presentation. It should be understandable to almost anyone and if not, it could be easily explained by the trainer.
- f. Appropriate emphasis of content elements: For the consulting approaches being taught in the series, it seems to me the emphasis on the content elements is very appropriate. It also appears that the trainer has freedom to alter the emphasis at any time he sees a need to do so.

- g. Adequate integration of content elements: The content elements appear to be adequately integrated.
- h. Parsimony: Having only skimmed the content and without the experience of being a participant or a trainer, I see little that could be left out. There surely is some though, since there are hundreds of pages.
- i. Sufficiency: For the approach to consulting that is being taught, it seems that there is sufficient content. I am especially impressed with the quantity and quality of it. I would like to see more content on other approaches to consulting, at least if only to call attention to the fact that there are other approaches and other resources available.
- j. Recommendations:
 - 1) Content be added that would deal with helping clients learn how to use consultants. The consultant does this indirectly when she/he works with the client, but I think learning how to use a consultant is something that should be taught directly to clients.
 - 2) Add content in the affective or gut level areas of learning for the consultant-trainee, and also content that will help her/him help clients deal with these areas. A consultant could graduate from this program and be unable to help clients deal with values, and feelings. She/he would have to have it before she/he started consulting or get it elsewhere on the way.
 - 3) Add content that would fit populations who are directly concerned with the school system but are not now targets of this program.
- 4. Appropriateness of training procedures for the system's purposes, content and intended population: For the cognitive and skill aspects of the training, the procedures are very adequate for the intended population. The training procedures for the affective areas, in contrast, are very inadequate. A

4. (continued) conscious decision was apparently made in developing the program that the affective aspects would be altered to reach the other target populations that I have previously suggested should be included.
 - a. Recommendations: Include some direct and planned for T-Group type experiences in all of the components of the series. This can be done by trainers who are trained to do it or by programmed and leaderless methods now available.

Ensure that the trainers are practicing what they are preaching. I can see the PETC trainers, just like the rest of us, telling students to do one thing while they do another. I believe trainees train others as they themselves were trained.
5. Clarity and appropriateness of the role of the trainer in this program:
 - a. The role of the trainer seems to be clear and appropriate, with the exceptions that I have already noted. The instructions for the trainer are clear, concise, adequate and appropriate. In addition he is allowed freedom to follow his own style. There may be too much freedom for the trainer in the case of a trainer whose values are not in line with the values underlying the program.
6. Side effects:
 - a. Graduates I have seen tend to have a missionary zeal which may put off some people, but such conversions may have some desirable attributes for the trainers.
 - b. Trainees may help a bad school system maintain itself or to resist changes that are needed. It depends much upon the motivation of the trainee and if insufficient attention is paid to the motivation of the consultant in training.

- c. Trainees, even though trained for working in educational systems, should be able to consult with most any other group that had people problems.
- d. This program has been designed as only a jumping-off point so many of its graduates will go far beyond the training they receive.
- e. These programs could be adapted for training other kinds of consultants.
- f. The programs could be taught for academic credit in colleges.

7. Additional strengths and weaknesses:

- a. Evaluation: Inadequate evaluation has been done and adequate means for evaluating the series have not been developed. The developers and evaluators of the program have not succeeded where the rest of us have failed, is all that I am saying. It would be very helpful to have behavioral objectives that could be used by trainees and trainers in the training and by the evaluators to assess results.
- b. Ivory Towerism: I wish the developers had been able to spend more time directly consulting with school systems while developing the program. Otherwise, I fear that the programs may be seen as too academic and/or labeled as ivory tower approaches.
- c. I would like to see more flexibility in the design and in the trainers so they would be able to adapt more to individual needs of trainees. I believe trainees can best learn how to adapt to individual needs of clients by having it done to her/him in training.
- d. The program seems to work and the participants are very pleased with what they have learned. Some graduates have spent a lot of time and money going through the program.

- e. To my knowledge, it is the only program of its kind. It is a badly needed resource in the field of education. I hope that it is made available to all systems that can profit from its use.
- f. My guess is that it is one of the least expensive ways for a school system to acquire the consultant expertise that it needs.
- g. Most of the exercises, especially in the early part of the series are old friends and have been well tested.
- h. People who enroll in PETC workshops are probably people who want to bring about changes in themselves and in the school systems so the program does not have to be concerned with motivating the trainees to learn and change.
- i. The real strength of the program in my view, is the kind of people the developers are. Good training programs are not possible without good people as developers and trainers.

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

Title "Not yet developed"
Author Bonard S. Wilson
Publisher _____

Why did you choose this system?

It will hopefully more nearly fit me, my philosophy and way of working.

PETC would be brought in later by them, should we get that for and should they see it as a way of meeting their needs.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST	Low		Worth the difference	Will probably cost more
WORKSHOP FORMAT (including ease of implementation)	Very structured for those who like that	Too structured for a beginning intervention	Unstructured and non-directed	Will cause anxiety on trainees and trainers
QUAL CONTENT	Plenty of materials	Affective content is insufficient for getting at a lot of current problems	Fewer materials help them to put into practice what they already know	Trainees may want more materials so they can feel they are "learning"
PROBABLE SHORT-TERM EFFECTS	Each segment has some effects		Will get them started immediately on being responsible for their own problems	May be hard for them to identify the short-term effects. I may get fired
PROBABLE LONG-TERM EFFECTS	Built in capacity to continue	May cause them to become dependent	They will rapidly become responsible for their own system and behavior	I'll work myself out of a job
USEFULNESS TO CLIENTS	Very useful for what it sets out to do		Very useful. They'll really be able to have in-house capability to run their own show	

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC			OTHER SYSTEM		
<u>COST</u> ☒ Reasonable ☐ Somewhat Reasonable ☐ Prohibitively Expensive			<u>COST</u> ☒ Reasonable ☐ Somewhat Reasonable ☐ Prohibitively Expensive		
<u>WORKSHOP FORMAT</u> ☒ Well-organized ☐ Parts were Organized ☐ Poorly Organized			<u>WORKSHOP FORMAT</u> ☒ Well-organized by the trainees ☐ Parts were Organized ☐ Poorly Organized		
<u>MATERIAL CONTENT</u> ☐ Comprehensive ☒ Adequate ☐ Superficial			<u>MATERIAL CONTENT</u> ☒ Comprehensive ☐ Adequate ☐ Superficial		
<u>USEFULNESS TO CLIENTS</u> ☒ Useful for certain people ☐ Somewhat Useful ☐ Not Useful			<u>USEFULNESS TO CLIENTS</u> ☒ Useful ☐ Somewhat Useful ☐ Not Useful		

Which would you recommend your client system select?

_____ PETC first and then

_____ Other System

ALTERNATIVES SEARCH

This aspect of the total evaluation is aimed at identifying and describing alternatives to the PETC series for providing training in consulting and organizational development. An extensive search was initiated in conjunction with an alternatives search for PETC-I and PETC-III.

Methodology

About 110 letters requesting information, accompanied by a response form, were mailed to a variety of people and institutions associated with process consulting and organizational development. Information requested generally consisted of the names of training packages or programs in consulting or organizational development and details about the requirements, procedures and expected outcomes of these alternatives. Approximately 35 of these requests were returned. In addition to the letters, computer searches were made of the ERIC and Houston Information Systems. The search resulted in the identification of 30 instructional systems. Many of these programs did not pertain directly to process consulting or organizational development and were not used in the final comparisons. Twelve of the instructional systems did provide training in process consulting or organizational development. These twelve were compared with PETC on the following dimensions: target populations, training content, instructional procedures, expected outcomes and dissemination.

Results

This section contains a comparison of PETC with the 12 alternative instructional systems identified in the alternative search. The results are organized with the six comparison criteria referred to above. A summary of the comparison is presented in Table A52.

Table A52

A Comparison of 12 Alternative Instructional Systems in Process Training,
Consultation and Organizational Development

Dimensions	Comparison Information
Instructional System or Program	Preparing Educational Training Consultants: Consulting PETC-II Northwest Regional Educational Laboratory 710 SW Second Avenue Portland, Oregon 97204
Target Population	Practicing educators in roles open to provide training and consultation Several areas and level of education In groups of 12 to 18 Prerequisites of 3 problem solving and 2 interpersonal skills workshops
Content Provided in Training	Use of skills training exercises for process issues Small group diagnosis and intervention for planned change improvements Organizational development theory and practice in education Self insight and professional growth
Workshop Procedures and Strategies	Workshops with range of theory and experiential learning activities Trainer supervision and interteam consultation Practicum with client groups for each team Diagnostic instruments and techniques Extended organizational development project Emphasis on peer learning groups
Expected Outcomes	Familiar with and able to use materials Clear motivation/self-selection Self-diagnosis and values consideration Increased training where role permits Positive toward training Clearer conception and philosophy Some increased practice skills Colleagueal norms among peers
Trainers	Experienced in structured and unstructured process training Experienced in training trainers Experienced with PETC-I, PETC-II, PETC-III and NWREL prerequisite systems as participant and trainer, knows literature
Dissemination	National network, brochures, word of mouth PETC = 39 workshop days plus 26 days of prerequisite workshops Average cost \$21 per trainer per day 500 started, 50 completed limited offering of workshops in past 3 years of development Academic credit frequently offered Evaluation Reports available from NWREL

Table A52
Page 2 of 13

Dimensions	Comparison Information
Instructional System or Program	Process Approach to Planned Change Dr. Nick Colorell, President Center for Planned Change 2039 N. Geyer Road St. Louis, Missouri 63132
Target Population	Various school personnel Educational Teams of 4 to 8 up to total of 100 Prerequisites are selection by peers and according to personal characteristics
Content Provided in Training	Systems theory Value based planned change strategies Small group theory and planned change skills Management theory Planning skills Communication skills Development of plans and strategies
Workshop Procedures and Strategies	Theory input Team learning tasks Skill practice Team building Behavior contracts Evaluation Long-range planning
Expected Outcomes	Trained internal change agent consulting team Change in the organization including: Improved internal climate Organizational direction setting Organizational value clarification Adaptation in response to environment Human resource development
Trainers	One trainer per team "Center staff" or local trainer with "high level of experience" "Masters level education people" can become trainers
Dissemination	No particular strategy 10 days spread variably \$50,000 to train 2 year OD program Between 500 and 750 trained Academic credit available Evaluation claimed

Table A 52
Page 3 of 13

Dimensions	Comparison Information
Instructional System or Program	Advanced Consultation Skills Lab Social Science Education Consortium Boulder, Colorado
Target Population	Various educational roles Education Minimum group of 25 No prerequisites
Content Provided in Training	Skills practica on process issues Consulting issues Theory: Benne, Lewin, Moreno
Workshop Procedures and Strategies	Trainer lead whole group discussions and activities Demonstration and small group practice of skills
Expected Outcomes	Variable according to participants Practiced consulting skills, tools, methods Conceptualized consultation process, strategies Made backhome plans Explored value and causal consequences
Trainers	Ron Lippitt and Eva Schindler-Rainman
Dissemination	Brochures and word of mouth 3 days \$135 = \$45 per day Between 150 and 200 trained No academic credit No evaluation

Table A52
Page 4 of 13

Dimensions	Comparison Information
Instructional System or Program	Introduction to Organization Development Mathew Miles 94 Sparkill Avenue Tappan, New York 10983
Target Population	Any educators Education 8 to 35 participants No prerequisites "other than an interest in OD"
Content Provided in Training	Stages of an OD change effort as outlined in Schmuck and Miles, <u>Organization Development in Schools</u>
Workshop Procedures and Strategies	Theory input Small groups work through case study Role play Whole group discussion of diagnosis and intervention
Expected Outcomes	Cognitive clarity about OD Increased basis for making OD decision
Trainers	Matt Miles David Kellcher
Dissemination	Brochure 2½ days Usually \$100 to \$150 = \$50 per day 100 to 150 trained No credit No evaluation

Table A52
Page 5 of 13

Dimensions	Comparison Information
Instructional System or Program	Doctoral Program in Organizational Behavior Department of Organizational Behavior School of Management Case Western Reserve University Cleveland, Ohio
Target Population	Graduate students School of management 10 new students per year No prerequisites specified
Content Provided in Training	Conceptual and theoretical background to OD Personality theory and development process Interpersonal relations and group dynamics Organizational theory Large systems and cultural processes Methods and skills of applied behavioral science Personal development
Workshop Procedures and Strategies	Seminars Personal development groups Research and development projects Practicum in 2nd or 3rd year Individualized strategies Dissertation in 4th year
Expected Outcomes	"Broad based behavioral scientists" skills in: Teaching and research in OD OD planning and development Consulting Managing change Conflict resolution Laboratory training
Trainers	Faculty of 16 for 40 students
Dissemination	No strategy 3 to 4 years \$2,850 for 2 semester years 57 Ph.D. graduates Ph.D. program No evaluation reported

Table A52
Page 6 of 13

Dimensions	Comparison Information
Instructional System or Program	Organizational Effectiveness Training Ms. Lee Douthit Consultant/Trainers Southwest Administrative Office P.O. Box 947 Emporia, Kansas 66801
Target Population	All levels of management personnel Many field including education 9 to 24 participants One week of "laboratory experience" plus being in organization where learnings can be applied
Content Provided in Training	Strategies for data gathering and analysis Systems analysis Goal setting and planning change Methods for program evaluation Identifying and diagnosing organization ills Conflict coping strategies Organization theory
Workshop Procedures and Strategies	Laboratory method of experiential learning Design evolves according to participant needs and goals Backhome change project between 3 week long workshops
Expected Outcomes	Gather and use data Plan goals and priorities Develop methods of evaluation Problem solving Management of conflict Make a systems analysis Recognize effects of own and others behavior Internal consultant and manage OD Gain in self-confidence
Trainers	Ms. Eleanor Hill and assistants
Dissemination	Mailing and word of mouth 3 one-week workshops over 6 months \$800 - \$38 per day Between 75 and 125 trained No credit No evaluation

Dimensions	Comparison Information
Instructional System or Program	Advanced Organizational Development Training Lab Consultant/Trainers Southwest Administrative Office P.O. Box 947 Emporia, Kansas 66801
Target Population	All levels of management personnel Many fields including education 9 to 24 participants Previous "OD training experience of at least several days duration"
Content Provided in Training	Data handling Problem solving Decision making Communications Planning and implementing change Creating organizational atmosphere for change Training organizational colleagues for using OD technology
Workshop Procedures and Strategies	Laboratory method of experiential learning Design evolves according to participant needs and goals
Expected Outcomes	Increased skills and insights in: Data handling Problem solving Decision making Communications Planning and implementing change Creating organizational atmosphere for change Training colleagues for using OD technology
Trainers	Trainers who are part of Consultant/Trainers Southwest network 3 trainers experienced in: Organizational consulting Personal growth Organizational development
Dissemination	Mailing list and word of mouth 6 straight days \$230 = \$38 per day Between 75 and 125 No credit No evaluation

Table A52
Page 8 of 13

Dimensions	Comparison Information
Instructional System or Program	Organizational Renewal Workshop--Gordon Lippitt, Developer Jacqueline Rumley, Executive Director Organizational Renewal, Inc. 5606 Lamar Road Washington, D.C. 20016
Target Population	Primarily line personnel or staff personnel who train others Various fields 12 to 24 participants No prerequisites
Content Provided in Training	Understanding growth potential of organization Developing communications in organization Developing organizational teamwork Coping with change Implementing renewal in an organization
Workshop Procedures and Strategies	Film for theory input Written "instrument" to guide learning Group discussion
Expected Outcomes	Participants will have: Diagnostic tools for analyzing organizations Practice in process skills Theory in organizational growth and communications A change project to initiate in their organization
Trainers	Network of 165 certified trainers Can train an "in-house" trainer Training trainer involves going through workshop plus 1 day briefing Certify only people who have basic trainer and group leader skills already
Dissemination	3 regional vice presidents and network of trainers, direct mailing 5 modules, each 3 1/2 hours Cost of \$150 to \$250 = \$60 per day No evaluation indicated

Dimension	Comparison Information
Instructional System or Program	Team Building and Process Consultation Rick Reichard, Director--Professional Development Division NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	People active in applied behavioral science Various fields Minimum of 30 participants Must have completed an NTL "Advance Professional Development Learning Community Core Program"
Content Provided in Training	Process consultation using Ed Schein's book
Workshop Procedures and Strategies	Team building Case study Inter-team consultation Theory building from experience
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 5 days straight \$350 = \$70 per day No credit indicated Participant questionnaires used for self-ratings of program

Table A52
Page 10 of 13

Dimension	Comparison Information
Instructional System or Program	Program for Specialists in Organization Development John Adams, Director--Professional Development Division NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	Mainly internal OD practitioners plus a few external and teachers of OD Various fields Maximum of 40 participants Must have a "basic lab" and NTL consultation or training theory and practice lab plus OD experience
Content Provided in Training	Professional and personal self-assessment OD theory, techniques, directions, ethics Dynamics of large and complex systems
Workshop Procedures and Strategies	Experiential learning Didactic cognitive inputs
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 2 weeks straight \$700 = \$70 per day No credit indicated Participant questionnaires used for self-ratings of program

Dimensions	Comparison Information
Instructional System or Program	Observation and Intervention in Work Groups Rick Reichard, Director--Center for Professional Development NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	Anyone concerned with making work groups more effective Any field 12 to 24 participants Must have an NTL "Advanced Professional Development Training Community Core Program"
Content Provided in Training	Theories of intervention Conceptual maps for observing groups Group intervention
Workshop Procedures and Strategies	"Personal case papers" for theory building Observation of audio-taped groups Video-taped intervention simulations
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 5 days \$350 = \$70 per day 45 trained No credit indicated Participant questionnaires used for self-ratings of program

Table A52
Page 12 of 13

Dimensions	Comparison Information
Instructional System or Program	Consultation Skills Seminar Scientific Methods, Inc. P.O. Box 195 Austin, Texas 78767
Target Population	Consultants, trainers, OD specialists Business and industry 8 to 32 participants Prerequisites "defined by the roles of the target population"
Content Provided in Training	"Consulcube" by Blake and Moulton Five intervention strategies Five units of change Four focal issues
Workshop Procedures and Strategies	Experiential learning Skill practice Case studies Pairing and small groups
Expected Outcomes	Participants will be: Experienced with "consulcube" Able to evaluate strengths and weaknesses of OD interventions Will have systematic approach to determining change interventions
Trainers	Only scientific methods personnel: currently 4 trainers in U.S. and 3 outside the U.S.
Dissemination	Mailing list and word of mouth 5 days \$750 - \$150 per day No credit Participants write critique of program

Table A52
Page 13 of 13

Dimensions	Comparison Information
Instructional System or Program	Internal Consulting Skills Workshop Gordon Lippitt, Developer Jacqueline Rumley, Executive Director Organizational Renewal, Inc. 5605 Lamar Road Washington, D.C. 20016
Target Population	Primarily staff roles that influence program changes from nonauthority position Various fields 12 to 24 participants Prerequisite to be in position to use training in their work, prefer training experience
Content Provided in Training	Consulting/helping process 4 phases of consulting Skill practice on entry Tools of data gathering, model building and training methods Skill practice on entry Evaluation of consulting and personal growth
Workshop Procedures and Strategies	Diagnostic instruments Skill practice Case Studies Exercises Group discussion Application groups Presentations
Expected Outcomes	To have studied process of internal consulting To have studied how consulting steps are handled depending on relationship to system To have provided opportunities to design strategies or models to implement problem solving and development needs of organization
Trainers	Network of 165 certified trainers Can train "in-house" trainer Training trainer involves going through workshop plus 1 day briefing Certify only people who have basic trainer and group leader skills already
Dissemination	3 regional vice-presidents and network of trainers, direct mailing 3 days \$150 to \$250 = \$50 per day In last four years, 750 trained plus 20 certified as trainers Academic credit sometimes arranged Self-evaluation at end of materials

Target Population

Three of the twelve alternative programs are described as being specifically for educators in roles comparable to those for whom the PETCs are intended. One program is for premaster's degree graduate students. It is included here as representative of 23 such university-based programs. Four programs are described as applicable across fields specifically including education. Three programs are described as for "behavioral science professionals" with no specific reference to education. One program is said to "tend toward business and industry."

Content Provided in the Training

Two of the twelve alternative programs provide some skills training similar to the first PETC system, but none appear to provide training explicitly in the use of skills training exercises. Six are concerned with planned change, small group work and consultation similar to the content of the second PETC system. Some of these seem to include content similar to some of the prerequisite systems for the PETC sequence. There is some emphasis on data gathering and use such as in the Research Utilizing Problem Solving system. Some include communications and at least one includes material on conflict. Six of the alternative systems are concerned with organizational theory and organizational development practice. One is solely concerned with a matrix model for conceiving diagnosis and intervention.

While areas of content focus among the alternative systems sound generally similar to the PETCs and their prerequisites, there seems to

be wide variability in terms of the specific content. Quite a bit of the content of PETC-I and III seems to be exclusive. A fair amount of material in many of the alternatives also sounds exclusive. Some alternatives sound complimentary to the PETCs while others might serve as reasonable substitutes for some prerequisites or for PETC-II. In any particular case, closer examination of the content and consideration of the training procedures and strategies would need to be carried out to know.

Workshop Procedures and Strategies

Procedures and strategies for the twelve alternative systems vary widely. They range from totally preplanned structure to a design created altogether spontaneously as a workshop progresses. As a sequence, the PETCs are similar in including variety and moving from high structure in PETC-I to a fair degree of openness within experiential exercises and the practica in PETC-II and III. One of the alternatives simply provides didactic input on film, plus written questions to guide large group discussions. Several alternative systems seem to rely heavily on trainer expertise for content as well as process guidance. Others seem more like the PETCs in using prepared materials for content expertise. Most are described as placing emphasis on some forms of experiential learning. Four emphasize small groups or teams similar to the PETCs. Five stress use of case studies. One has a practicum like PETC-II. One has a back home project which sounds more like the Research Utilizing Problem Solving prerequisite than the OD effort of PETC-III.

Expected Outcomes

Materials concerning three of the alternative systems do not include any statements of expected outcomes. A fourth is presented as an introduction to the field of OD. It offers expectations of cognitive clarity and an increased basis for making decisions about OD. A fifth offers expectations variable according to participants along with outcomes of problem solving consultation skills. The other seven offer expectations of conceptual understanding, skill and some experience in OD work. Some sound as though outcomes will include greater technical mastery of diagnostic and problem solving skills than others. The university Ph.D. program includes research and teaching skills. These last two are definitely not part of the PETC systems and their prerequisites. Otherwise, there is a lot of similarity at a general level between the PETCs and the alternatives. At a specific level, there appear to be many differences. The specifics of some of the alternatives sound similar to the PETC prerequisite systems, whereas others sound closer to PETC-I or PETC-II. Considering the amount of training time provided, none sound as comprehensive as the combination of the PETCs and their prerequisites with the possible exception of the university-based program.

Trainers

Three of the twelve alternative systems are conducted only by the one or two specific individuals who created them. The university Ph.D. program is conducted only by the faculty of that university. In our search we identified twenty-two other university programs which sounded somewhat similar. Five of the alternative systems are conducted only by staff of the organizations where they were created. One is conducted by staff of the organization where it was created, but they indicate they

can and will train local trainers when desired. Two of the systems are conducted by a national network of individuals who have been certified as capable. These last two rely heavily on films, written material and group discussion.

Dissemination

Only the last two alternative systems mentioned in the preceding section concerning trainers were created with an explicit intention of wide dissemination as were the PETCs. These are each three-day sessions and are correspondingly narrow in scope of content compared to the thirty-nine days of PETC training. There is probably some overlap in content with the PETCs, although they sound more complementary than competitive. The other systems have no dissemination strategy. Most rely on mailing of brochures or word of mouth for their marketing.

Two of the alternatives claim as many as 750 persons may have been trained. One of these includes 10 days of training. The other includes 3 days of training. Another system claims up to 200 trained, another claims up to 150 and two more each claim 125. Another claimed 45, and another 57. Four gave no indication of numbers trained. During the past three years of development work, about 500 persons have started through the combination of PETC systems and prerequisites to the stage of completing PETC-I. Fifty-one have completed the full sequence through PETC-III.

Although costs may vary when the PETC systems are presented, it appears that they are considerably lower than the alternative systems. It was possible to compute an average daily cost per trainee for ten of the alternative systems. These ranged as follows: \$38, \$45, \$50, \$50, \$53, \$60, \$70, \$70, \$70 and \$150. Average daily cost for the PETCs is about \$21.

Academic credit was indicated as available for only two systems, in addition to the university-based one. It has generally been available for the PETC systems.

Six alternative systems gave no indication of evaluation. Four indicate that participants fill out self-ratings at the end of training. For one, participants write out critiques at the end of training. One system claims evaluation has been conducted. Formative and summative evaluation reports are part of the procedures by which the PETCs have been developed during which time a variety of evaluation techniques have been employed.

Conclusion

The alternatives search indicates there are definitely training systems in use which are similar and/or complementary to the PETCs and their prerequisites in at least some of their content and strategies. With the exception of university-based programs, most are much shorter. While many appear to contain some material not in the PETCs, none seem to contain most of what is in PETC-I or a significant part of PETC-III. Only one indicates a differential system for diagnostic and intervention analysis such as is found in PETC-II. This one uses only one three-dimensional matrix combining diagnosis with intervention. A fair amount of the content of the alternatives sounds more descriptive of the prerequisite systems than the PETCs.

Use of the alternatives is controlled by their creators, even in the case of the two created with a dissemination network strategy in mind. Comparatively high costs for training accompany this proprietary approach. Very little formal evaluation is indicated as compared with the development work done on the PETCs and their prerequisites.

In summary, it appears that process training is increasing across the United States. It tends to be costly. Only the university programs and the PETC combination seem comprehensive and integrated. Some systems present options not covered by the PETC combinations. There is also much which appears unique to the PETCs. With the prerequisite systems, the PETCs seem by far the most comprehensive training combination available for inservice educators. Compared to alternatives, it is considerably less expensive per day of training.

SURVEY OF POTENTIAL USERS

A survey of potential users was conducted to determine the extent to which members of the target population believe an educational need exists for PETC. Additionally the survey obtained judgments of the feasibility of PETC training and assessed the respondents' interest in participating in PETC training.

Methodology

A prepared questionnaire was mailed out to a stratified random sample of individuals with staff development positions in state departments of education or public school districts. A copy of the questionnaire is included in Appendix B. The sample, obtained from Educational Curriculum Incorporated, contained 64 individuals in state departments of education, with positions of either state superintendent or staff development. The sample also included 100 individuals in positions of staff development with public school districts, 50 superintendents of public school districts and 50 public school counselors. The sample was stratified by size of the district.

One hundred questionnaires out of 264 were returned, a return rate of 38 percent. The background characteristics of the respondents are described in Table A53.

Results

In order to assess the perceived educational need for PETC training respondents were given a list of ten staff development functions and were asked to rate, on a five-point scale, the importance of each function for meeting their programs' and their personal goals. Table A54 includes the respondents' ratings of those functions that are directly

Table A53

Background Characteristics of Respondents

Characteristic	Number of Responses ^a
<u>Role Title</u>	
Superintendent	33
Director of Staff Development	23
Director of Curriculum	12
Administrative Assistant	12
Consultant	8
Counselor	6
Director of Guidance	3
<u>Level of Service</u>	
School District	56
State Department of Education	43
<u>Size of School Districts Represented</u>	
1,000 to 5,000	32
5,001 to 11,000	14
11,001 to 19,000	4
19,001 to 30,000	3
30,001 and up	2
<u>Total Years Experience in Education</u>	
1 to 10	14
11 to 20	44
21 to 30	31
More than 30	6
<u>Previous Attendance at a Workshop Similar to PETC</u>	
Yes	41
No	53

^aN=100.

Table A54

Respondents' Ratings of the Importance, to Themselves and to Their Program,
of Staff Development Functions Focused Upon in PETC

Function	Criteria For Rating Functions	Response Options					No Response	$\bar{X}$	SD
		Very Important 1	2	Neut 3	Not Very Important 4	5			
Providing inservice workshops on class- room group processes	Program's Goals	21	42	20	9	3	5	2.27	1.02
	Individual's Goals	41	45	6	4	0	4	1.72	.76
Providing consulta- tive help to indi- viduals such as teachers, building administrators or central office personnel	Program's Goals	42	40	12	4	0	2	1.78	.82
	Individual's Goals	57	36	4	2	0	1	1.51	.68
Conducted training in group processes for school faculties or work groups in the district or state	Program's Goals	13	29	39	10	4	5	2.61	.99
	Individual's Goals	34	37	21	3	1	4	1.96	.89
Developing a group of skilled individuals within the district or state who train and consult with others	Program's Goals	22	22	34	13	3	6	2.50	1.10
	Individual's Goals	40	38	13	4	2	3	1.87	.94
Providing consulta- tive help to small committees or task forces in the district or state	Program's Goals	32	40	18	5	0	5	1.96	.86
	Individual's Goals	40	43	8	6	0	3	1.79	.84

Note. N=100.

focused upon in PETC training. Table A55 includes the ratings of the traditional staff development functions which are not directly focused upon in PETC training. In all cases the respondents rated the staff development functions as having more importance to them than to their program. The individual means for both PETC and non-PETC related goals ranged from 1.42 to 1.98 and the program means of the importance of PETC related goals and non-PETC goals ranged from 1.78 to 2.64. All of the functions were perceived as important by both individuals and programs in meeting their goals for staff development. There was little difference in the importance attributed to PETC related staff development functions as compared to traditional staff development functions.

Table A55

Respondents' Ratings of the Importance, to Themselves
and to Their Program of Staff Development Functions
Not Focused Upon in PETC

Function	Criteria For Rating Functions	Response Options					No Response	$\bar{X}$	SD
		Very Important 1	2	Neut 3	Not Very Important 4	5			
Providing inservice workshops on subject matter content	Program's Goals	38	36	15	5	3	3	1.96	1.02
	Individual's Goals	40	43	9	5	0	3	1.78	.82
Providing inservice workshops on child development or child psychology	Program's Goals	13	33	32	14	5	3	2.64	1.05
	Individual's Goals	32	44	11	8	1	4	1.98	.94
Providing a plan for community involvement in schools	Program's Goals	15	45	25	9	2	4	2.35	.93
	Individual's Goals	43	39	15	1	0	2	1.74	.75
Developing and implementing an integrated long-term plan for staff development	Program's Goals	32	43	16	5	1	3	1.97	.90
	Individual's Goals	63	30	4	1	0	2	1.42	.63
Conducting training for interpersonal sensitivity, com- munication skills or personal growth	Program's Goals	19	32	33	9	3	4	2.43	1.01
	Individual's Goals	32	45	14	4	2	3	1.96	.91

Note. N=200.

Respondents were provided with a description of the PETC instructional system and were asked if they thought PETC would be useful for meeting their personal and their program goals for staff development. Table A56 contains a frequency distribution of the responses. Forty percent of the respondents indicated that PETC would definitely be useful for meeting their personal goals for staff development. PETC was perceived as definitely useful for meeting program goals for staff development by 24 percent of the respondents.

Table A56

Number of Respondents Indicating the PETC Instructional System Would be Useful in Reaching Personal or Program Goals for Staff Development

Question	Response Options				No Response
	Yes Definitely	Perhaps	Probably Not	Definitely Not	
Considering the importance <u>you</u> place on staff development, do you think the PETC instructional system would be useful for reaching your goals for staff development?	40	48	8	0	4
Considering the importance <u>your program</u> places on functions of staff development, do you think the PETC instructional system would be useful for reaching your program's goals?	24	62	8	1	5

Note. N=100.

Seventy-two respondents indicated that they believed there is definitely a need in the educational community for educators with group process consulting abilities. These results are included in Table A57.

Table A57

Number of Respondents Indicating a Need for Educators with Group Process Consulting Abilities

Question	Response Options				No Response
	Yes Definitely	Perhaps	Probably Not	Definitely Not	
Do you believe there is a need in the educational community for educators with group process consulting abilities?	72	23	2	0	3

Note. N=100.

The feasibility of PETC in terms of time and cost was assessed. Table A58 presents the respondents' perceptions of the length of time individuals and programs would allow for participation in a program such as PETC. The willingness of programs to pay the cost of PETC training is summarized in Table A59. Twenty-four respondents perceive PETC as definitely useful to their program's purposes; however, the cost and time factors pose potential problems for the installation of PETC. Forty-seven of the respondents indicated that their program might pay the costs of PETC training; only 18 respondents believed their program would allow two weeks or more for PETC training. These data tend to indicate that the length of PETC training makes it seem prohibitive for much of the target population. However, considerations given to shortening the training must take into account the goal of PETC, developing a group of skilled individuals who train and consult with others, which may be difficult to adequately meet in a shortened training time.

Table A58

Time Feasibility of PETC Rated According to
Personal Goals and Program Goals

Personal or Program Goal	Response Options						No Response
	30-40 Days Over A Year	15-30 Days Over A Year	2 Weeks Over 6 Months	1 Week	A Few Days	No Time	
Program	1	5	18	18	44	10	10
Personal	3	13	27	27	18	2	10

Note. N=100.

Table A59

Number of Respondents Indicating that Their District is
Willing to Pay the Costs of PETC Training

Question	Response Options				No Response
	Yes Definitely	Perhaps	Probably Not	Definitely Not	
In your opinion, would your school district or state department be willing to pay the costs (time and money) to enable an individual or individuals to participate in a program of group process consultation, such as PETC?	7	40	43	6	4

Note. N=100.

Respondents were asked if they would be interested in attending a workshop such as PETC and 66 indicated they would. Sixty-three respondents indicated that they would recommend a workshop such as PETC for their staff development program. These results are presented in Table A60.

Table A60

Respondents' Interest in PETC Training
For Themselves or Their Program

Question	Response Options		No Response
	Yes	No	
Would you be interested in attending a continuing workshop on group process consultation such as PETC?	66	24	10
Would you recommend a continuing workshop on group process consultation such as PETC for your staff development program?	63	25	12

Summary

Because of the small return rate (38 percent) the results are not generalizable; however, the following information can be summarized from the survey. Individuals placed a higher importance on all functions of staff development than did their program. The respondents perceived both the traditional functions and the PETC related functions of staff development as equally important. The length of training was indicated, by many of the respondents, as not feasible for their school district or state departments of education. However, most of the respondents indicated an interest in participating in PETC training.

Appendix B:

DEVELOPMENTAL HISTORY
OF PETC-II

DEVELOPMENTAL HISTORY OF PETC-II

The management plan for the Improving Teaching Competencies Program divides the work flow for the development of an instructional system into five phases: Planning, Pilot, Interim, Field Test and Outcome. Each phase consists of certain development, evaluation and field relations activities that culminate in a milestone report. The specific activities engaged in during the development of an instructional system differ according to the phase under consideration, the unique needs of the specific product or change support process being developed, and, occasionally, the style preferences among work unit teams. The following paragraphs describe in general terms the ways development, evaluation and dissemination activities are organized for each phase of product development. The actual developmental history of PETC-II follows the description of each stage.

Discrepancies between intended and actual activities are partly due to the fact that the current conceptions about the various phases were not produced until PETC-II was in the interim phase.

Planning Phase. In this phase, several key activities provide the focus for effort. The initial conception of the proposed instructional system is described along with its intended objectives. A need for the proposed system is documented, and evidence provided that adequate conceptualizations and instructional strategies exist or can be developed feasibly for the proposed training package. Initial development, evaluation and dissemination plans are produced, as are timelines, staffing needs and budgets.

In the case of PETC-II, development proceeded through the planning phase with no formal evaluation role. Development decisions were based on a literature review of consulting and planned change, a review of existing materials and strategies developed elsewhere, and input from content specialists in organizational development. (For further information about these activities, see Basic Program Plans, April 1972, pp. 218-236.) An exploratory test was conducted in Oregon with ten potential users to ascertain the feasibility of the instructional system.

Pilot Phase. In this phase, a prototype of the instructional system is developed and tried out on a small group of users from the target group. Objectives of the system and entry conditions for participants are clarified. Program evaluators provide formative evaluation information to assist developers with revisions. The information includes observer and trainer assessments of participant involvement in the activities, measurements of participant satisfaction with the content, strategies and utility of the system. The workability of the activities, the logic of the content and the quality of the teaching aids and materials are also assessed at this phase by the user groups. Description and preliminary assessment of trainee outcomes are initiated.

The collection of information regarding the marketability and costs of the instructional system commences during the pilot phase as does the documentation of the developers' claims regarding the intents of the system in comparison to existing alternatives.

The pilot stage of PETC-II began with the first workshop in August of 1971 and was completed in December of 1971. In that four-month period, three workshops, with a total of forty-four trainees, were conducted with public education supervisory personnel and university professors in

Washington, Oregon and Idaho. The evaluation results of these workshops indicate that the instructional strategies were generally feasible and that trainees found the training enjoyable and valuable.

There was no formal progress made in description and preliminary assessment of trainee outcomes. No formal analysis was made of the system content or strategies by experts or evaluators.

Interim Phase. During this phase, the instructional system goes through one or more cycles of revision and a nearly finished product is completed. By the end of this phase, the appropriateness of objectives has been determined, statements of objectives finalized and instrumentation to measure these selected or developed. For instructional systems requiring a workshop format, specifications are determined for desirable workshop conditions and qualifications for effective trainers.

The major focus of the evaluation activities for this phase is on confirmation of the system's ability to produce specified short-term outcomes and to test the workshop conditions, trainer qualifications and dissemination feasibility. This may be accomplished partially through conducting a "criterion workshop" designed to resemble closely the field conditions. The basic decision served by evaluation is whether the instructional system is ready for internal summative evaluation and adequate for comprehensive field and outcome testing.

During the Interim Phase three cycles of development occurred. Two workshops, one in Minnesota with twenty-four trainees and another in Oregon with twelve trainees, made up the first cycle. The evaluation report from Cycle 1 raised a set of questions about the possible need to broaden the scope and focus of the training system to include more organizational theory, additional conceptualization of the consultant role, and more

opportunity for trainers to identify their own ideological and value base for assuming the consultant role. In addition, strategies for achieving existing objectives were evaluated and specific recommendations for improvement based on field data were made (see Lohman, June 1973).

Revisions responding to the above issues were tested in Cycle 2 at two workshops in Florida and Minnesota, including a total of twenty-four trainees. Evaluation results from these workshops suggested a number of continuing issues and problems that became the subject of an additional cycle of revision and testing.

After a careful review of the content of this system, as it relates to the other PETC systems and the available data from all systems, it was decided to further revise PETC-II to broaden its scope and continue with a third cycle of trials within the interim milestone period. Two workshops including twenty-nine participants were conducted in Cheney, Washington, and Portland, Oregon, to complete the third cycle. Based on evaluative information provided from this cycle, the system was revised by the developers and prepared for final field testing. The major feedback for revision in Cycle 3 came from several expert reviews and focused on the need for additional material on designing intervention, and linking data to diagnosis and diagnosis to interventions in the participants' consulting work.

Field Test Phase. In this phase, minor revisions are made on the instructional system and a product close to finished form is expected to exist. Also, in this phase, internal summative evaluation will focus on assessment of short-term outcomes of the instructional system. Specifically, this means finding answers to questions regarding knowledge, awareness and attitudinal growth, and participant performance change that can be expected as a result of active participation in the system's training design under

field conditions with typical trainees, trainers and workshop settings. Variables related to problems of installation and dissemination may also be examined at this point.

The Field Test and Outcome milestones were combined for PETC-II; therefore the Outcome Phase is described next.

Outcome Phase. During this phase, which may occur simultaneously with the previous phase, the instructional system is finished and internal summative evaluation will assess the system's ability to produce, not only specified short-term outcomes in terms of participant satisfaction, knowledge, awareness or attitudinal growth and performance change, but also transfer, retention and impact upon secondary audiences such as students and/or peers. At this point evaluation plans are made for external summative evaluation studies such as critical comparisons between the outcomes of the instructional system being evaluated and outcomes produced by other relevant treatment efforts. External summative validations of the product are also completed in this stage.

The evaluator anticipated that much of this information would be provided through the Field Test and Outcome milestone evaluation activities. However, it was the evaluator's conclusion at the beginning of the Field Test that much of this information could not be obtained within the economic and time resources available.

Summative information on the merit of the instructional system was obtained through the activities outlined in this report. The information consisted largely of judgments of others (experts, past and potential participants, clients, trainers and installers) and descriptive information about the kind of consulting done by PETC-II graduates. Descriptive information about alternatives to PETC for obtaining consulting training was obtained.

REFERENCES

Basic Program Plans. Portland, Oregon: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, April 1972, pp. 218-236.

Lohman, John E. Technical Memo on Preparing Educational Training Consultants (PETC), PETC-II: Consulting. Portland, Oregon: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, June 1973.

Appendix C:

COGNITIVE AND PERFORMANCE OBJECTIVES
OF PETC-II

COGNITIVE AND PERFORMANCE OBJECTIVES OF PETC-II

COGNITIVE OBJECTIVES

Following the workshop, trainees should:

1. Understand the role of the consultant
2. Know and be able to apply the phases of consultation described in the materials
3. Know and be able to apply the differential diagnostic matrix (DDM)
4. Know the functions of human systems in the DDM
5. Know some of the symptoms that indicate a particular function is weak or missing
6. Understand some of the operational characteristics in the DDM
7. Know some of the problems that may occur with several of the operational characteristics in the DDM
8. Understand and be able to apply the differential intervention matrix (DIM)
9. Know some of the facilitative roles in the DIM
10. Know some intervention strategies
11. Know and be able to apply the problem solving stages in the DIM
12. Understand the differences between problem solving stages and phases of consultation as utilized in PETC-II
13. Understand the relationship of the DDM and DIM to the phases of consultation
14. Understand the distinctions between PETC-II consulting issues and PETC-III organizational issues
15. Know strengths and weaknesses in their own consulting knowledge and skills
16. Know several advantages and disadvantages to taking both internal and external consulting roles
17. Understand their own values and motives for being consultants

PERFORMANCE OBJECTIVES

The PETC-II instructional system teaches trainees a consulting process.

As a result of training, the consultants are expected to be able to:

1. *Build a helping relationship with client groups*
 - a. Help a client group analyze and determine its need for change
 - Help the client group identify and clarify its problem or difficulty
 - Help the client identify and clarify the desired change
 - Help the client clarify the present and potential motivation for and against change
 - Secure an agreement from the client about whether to implement a change process
 - b. Establish and maintain a change relationship with the client
 - Clarify and secure an agreement about policy and constraints of the consulting relationship (e.g., time constraints, role expectations of the client and consultant, and how to terminate the relationship)
 - Secure an agreement from the client about whether to proceed with the consultation
 - Monitor the change relationship throughout the consultation by reviewing agreements, checking perceptions, and negotiating changes or termination
2. *Diagnose the client's problems through application of the diagnostic model provided in the training*
 - a. Obtain information from the client group about its problems and characteristics
 - b. Identify the different *levels* of various problems within the client system (e.g., individual, dyad, small group, and organization)
 - c. Identify the organizational *functions* that need to be temporarily supplemented in order to allow the client group to make progress toward its goal (e.g., planning, managing, and producing)

- d. Identify what is problematic in the client's *characteristic ways of operating* that is causing the weakness in function (some examples of operating characteristics are: norms, influence, and perceptions)
 - e. Help the client interpret and clarify the diagnostic information
 - f. Secure an agreement with the client on the problem to be solved
3. *Develop and implement a plan for helping the client group solve its problem by following the intervention model provided in the training*
- a. Identify the client's stage in the problem solving process
 - b. Select a strategy appropriate for the client and the problem identified
 - c. Identify the most appropriate role for the client group's own part in the intervention
 - d. Obtain information about the effectiveness of the intervention

Appendix D:

EVALUATION INSTRUMENTS

EVALUATION INSTRUMENTS

CONTENTS

Background Questionnaire	239
Final Questionnaire	245
Client Questionnaire	255
Trainer Interview Schedule	257
Installer Interview Schedule	261
Trainer Log	267
Followup Interview Schedule	269
Consulting Log	275
Activities Record	281
Preconsultation Client Questionnaire	285
Postconsultation Client Questionnaire	287
Expert Review Guidelines	293
Alternatives Search Questionnaire	299
Survey of Potential Users	303

Workshop #:
Location:
Trainers:

BACKGROUND QUESTIONNAIRE

1. Name _____ Sex _____ Age _____
2. _____
Mailing address street city state zip
(for followup information)
Phone _____
3. Occupation _____ Years of work experience _____
Position or Job Title _____ Yrs. this position _____
State _____ District _____ School _____ Classroom _____
University _____ Other _____
4. Check the highest level of education completed:
_____ High School
_____ College (major) _____
_____ Advance degree (major) _____ Degree: _____
5. Please list the workshops you have conducted in the past 5 years. Include human relations, group dynamics, organization development, personal growth, T-groups, sensitivity training, marathons, Gestalt encounter, as well as NWREL workshops. Include the approximate amount of time spent in each workshop.

6. Please list the training programs or workshops in which you were a participant in the past 5 years. Include all kinds of training mentioned in Question 5. Indicate the amount of time in each.

(x) NWREL Workshops:

_____ IPC

_____ RUPS

_____ PETC-I

_____ INF

7. Have you taken any courses in organizational theory?

_____ Yes

_____ No

If yes, please describe.

8. What do you think this workshop will teach you to do?

9. Several possible things you might have expected to learn from this workshop are presented below. For each item write:

Yes if you expect to learn the skill.

No if you do not expect to learn the skill.

? if you do not know if you will learn the skill.

- a) Solve a client system's problems
- b) Identify own competencies and needs
- c) Diagnose client problems
- d) How groups change
- e) Become an organization development consultant
- f) Act as a temporary consultant to a client system
- g) Conduct unstructured learning experiences
- h) Conduct PETC-II: Consulting Workshops
- i) Other (what?) _____

10. Sometimes people consult in technical matters such as a curriculum design or reading. One can also consult in group or organization processes such as staff development or communication skills.

Check which kinds of consulting you have done:

- a) Technical matters
- b) Group or organization processes
- c) No consulting experience

If you checked "b" Group or organization process consulting please respond to the following questions:

Choose an experience representative of what you typically do as a consultant or the most recent consulting experience you have had. Indicate below which this is.

 Typical consulting experience for me

 Most recent consulting experience for me

The size of the client system was _____

The duration of the consultation was _____

You were paid by _____ (organization) for your services.

Briefly describe the client group.

Briefly describe the client system's problem or goal.

Briefly, what did you do as a consultant?

Describe the major outcomes of the consultation--the problems solved or goals achieved. Specifically, what was accomplished?

What was your professional relationship with the client system (if any)?

Describe how the consulting relationship began: how did they know about you, how did they contact you?

How many different client groups have you worked with in the last two years? If you worked with some groups more than once, indicate how many times like this: 5 groups once; 2 groups twice, etc. (Do not include GPS workshops unless they were part of a formal consulting relationship with a client.)

How many of these consultations were a result of your participation in PETC-I?

PETC II: Consulting

Workshop #:
Location:
Trainers:

FINAL QUESTIONNAIRE

Name _____

Please do not
write in this
margin

A. To what extent has this workshop fulfilled your expectations about what you personally might get out of it?

1. Has not come up to my expectations

--	--	--	--	--	--

 Has exceeded my expectations
2. What exactly has happened that brings you to this conclusion?

B. Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them? (CHECK ONE BOX IN EACH LINE)

3. Only restated or proved what I already know

--	--	--	--	--	--

 Offered new insights, new ways of viewing old problems
4. Spoke to important issues, vital concerns

--	--	--	--	--	--

 Missed the important issues, vital concerns
5. Hard to understand, complex, full of "jargon"

--	--	--	--	--	--

 Clear, concise, understandable
6. Ideas, skills, methods can be used immediately under existing conditions

--	--	--	--	--	--

 Usage would require changes in conditions that I have no control over

Final Questionnaire

7. Little "how to" help for my actual group work

--	--	--	--	--	--	--

Provided real "how to" help for my actual group work

8. Material maintained my interest

--	--	--	--	--	--	--

Material failed to interest me

9. Demanded much original thinking

--	--	--	--	--	--	--

Demanded no original thinking

10. Practice exercises were of little or no value

--	--	--	--	--	--	--

Practice exercises were of great value

11. Session time was well used

--	--	--	--	--	--	--

Time in the sessions was wasted

12. Structure useful promoted learning

--	--	--	--	--	--	--

Too structured, blocked learning

13. Gained new insights about my style of consulting

--	--	--	--	--	--	--

Learned nothing new about my style of consulting

14. Allowed time for reflection about self and personal growth

--	--	--	--	--	--	--

Did not allow time for reflection about self and personal growth

C. Considering this workshop as a training program for colleges and school districts-- (CHECK ONE SPACE FOR EACH QUESTION)

15. How would you rate it in terms of its potential for organizational improvement?

Low potential

--	--	--	--	--	--	--

High potential

16. How would you rate this workshop compared to other professional education courses you have taken?

Very low

--	--	--	--	--	--	--

Very high

Please do not write in this margin

Final Questionnaire

Please do not
write in this
margin

D. Consulting with a Client

17. In an overall assessment of your consulting experience, was it:

Extremely
valuable,
worthwhile
experience.

Much learning
accomplished.

--	--	--	--	--	--

Little value,
no learning
accomplished

What are the major factors contributing to your assessment?

18. What were the specific learnings for you as a result of your consulting experience?

19. Problems arise in almost every consulting experience. What sort of problems, if any, did you encounter?

E. In all honesty, how much do you plan to use the ideas, skills and/or materials presented in this workshop as an integral part of your work?

20. Extensively

--	--	--	--	--	--

Not at all

21. How do you think this workshop experience will be of value to you in the future?

Final Questionnaire

Please do not
write in this
margin

F. Now that the workshop/course is over, how would you sum up the experience?

22. Not very
worthwhile

--	--	--	--	--	--

Extremely
worthwhile

23. What are the major factors contributing to your assessment?

24. Which of the following costs did you incur out of your own pocket in order to attend this workshop? If so, please estimate the amount.

\$ _____ Travel costs

\$ _____ Room and board

\$ _____ Tuition or fees

\$ _____ Other expenses (what?) _____

25. Did you give up potential income in order to attend (e.g., other jobs)?

_____ No

_____ Yes. If yes, please give an estimate of how much \$ _____

26. Considering the costs (e.g., monetary, time, etc.) that you incurred in order to attend this workshop, how do you feel?

_____ The costs were too great compared to what I got out of it.

_____ The costs were about right for what I got out of it.

_____ The costs were small compared to what I got out of it.

Additional Comments:

Final Questionnaire

Please do
not write
in this
margin

G. Please circle the response that best reflects your opinion of the following characteristics of the workshop.

27. Please rate the goals and objectives for:

a. Clarity

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

b. Significance/Importance

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

28. Please rate the workshop content: Skills, concepts, principles, and values for:

a. Appropriateness for your experience and understanding

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

b. Relevance for learning to be a consultant

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

c. Clarity of presentation and definition

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

d. Parsimony (little or no unimportant or not useful material)

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

e. Practical significance for successful consulting

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

Final Questionnaire

Please do
not write
in this
margin

29. Please rate the workshop methods/strategies/procedures for:

a. Appropriateness for learning to be a consultant

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

b. Practical usefulness in learning consulting skills

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

c. Efficient use of time

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

30. Please rate the preworkshop orientation materials and activities for:

a. How successfully they provided you with information you needed

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

b. How successfully they gave you clear and correct expectations about the nature of the workshop

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

Final Questionnaire

Please do
not write
in this
margin

31. Will you have the opportunity to actually do the kind of consulting taught in PETC-II?

☐ Yes (Do you expect to do so?) _____
☐ No (Why?) _____
☐ Uncertain (please explain) _____

32. Do you think time commitments and prerequisites for PETC-II are excessive?

☐ Yes, definitely; could be reduced somewhat
☐ No, they are demanding but necessary
☐ No strong opinion either way

33. Did you need the approval or release of a supervisor in your organization to attend this workshop?

If so, would you mind if we were to contact that person about his/her perceptions of PETC-II?

If no, please provide a name, position and, if possible, a phone number or other means of contacting this person.

34. Do you believe there is a need in the educational community for educators with group process consulting abilities?

Check one: ☐ Definitely strong need
☐ Probably some need
☐ Probably not much need
☐ Definitely no need
☐ No opinion

35. Please rate the potential of PETC-II for meeting such a need:

Circle one: Excellent Good Fair Poor None

Please respond to the following statements by circling:

SA = Strongly agree

A = Agree

D = Disagree

SD = Strongly disagree

A. How helpful/useful did you find the Differential Diagnostic Matrix in diagnosing your client's problems?

- SA A D SD Useful for labeling and communicating with consulting team.
- SA A D SD Distracted and confused me with concepts and issues unrelated to my client's problems.
- SA A D SD Helpful in understanding my client's problems.
- SA A D SD Kept me from really focusing on my client's real problems and their causes.
- SA A D SD My own instincts and observations of the client's problems were more useful than the DDM.
- SA A D SD The difference between functions and operational characteristics is not clear.
- SA A D SD I don't understand the term/concept of operational characteristic.
- SA A D SD The DDM provides a really useful way of focusing in on a group's problems.
- SA A D SD Other (what?) _____

B. How helpful did you find the Differential Intervention Matrix in planning and carrying out procedures for helping your client?

- SA A D SD Provided a good checklist of possible procedures and roles.
- SA A D SD The processes for design dimension of the DIM was not useful.
- SA A D SD It makes more sense to look at the client's problems and goals and then design an appropriate strategy without the DIM.
- SA A D SD The DIM was helpful in deciding what to do to help a client.
- SA A D SD Other (what?) _____

C. How helpful/useful did you find the phases of planned change in building helping relationships with a client?

SA A D SD Helped me keep important consulting issues in mind as I worked with my client.

SA A D SD Helped me organize my consulting activities.

SA A D SD Confused me with too many things to keep track of.

SA A D SD Provided too rigid a process for consulting; the world doesn't fit into such a mold.

SA A D SD Other (what?) _____

CLIENT QUESTIONNAIRE

Workshop #:

Site:

Trainers:

1. What were your expectations for the consultation sessions?

2. How did you feel about the whole experience?

Very

Disappointed

--	--	--	--	--	--	--

Very

Pleased

What did or did not happen to make you feel this way?

3. Please mark one box in each line below.

Consultation sessions were:

a. Much Help
to Me

--	--	--	--	--	--	--

Little Help
to Me

b. Open,
Frank

--	--	--	--	--	--	--

Cautious, Closed,
Reserved

Competence of consultants:

c. Generally
Incompetent
in Areas
Where Help
Was Needed

--	--	--	--	--	--	--

Generally
Competence in
Areas Where
Help Was Needed

d. Consultants
Worked Well
as a Team

--	--	--	--	--	--	--

Consultants Did
Not Work Well
as a Team

Client Questionnaire, Page 2

4. List two or three things the consultants did that gave you THE
MOST help:
- a.
 - b.
 - c.
5. List two or three things the consultants did that gave you THE
LEAST help:
- a.
 - b.
 - c.
6. If you can, list something you intend to do different because of
this session:

Do you believe there is a need in the educational community for educators
with group process consulting abilities?

(Check One)

- ☐ Definitely strong need
- ☐ Probably some need
- ☐ Probably not much need
- ☐ Definitely no need
- ☐ No opinion

Workshop #:
Site:
Trainers:
Trainer: _____

TRAINER INTERVIEW SCHEDULE

Directions: Record the interview and make brief notes as you proceed on the Interview Schedule.

1. Have you previously been a trainer for PETC-II?

Probe: Date:
Location:

2. Did you find the workshop difficult or easy to administer and manage?

Probe for difficulties:

3. Did you find the session by session directions to the trainer adequate?

Probe for difficulties:

4. Did you find your role as a trainer in this system to be:

Clear

Unclear

Feasible

Unfeasible

Interesting

Boring

Challenging

Unchallenging

Probe for reasons, causes and particular examples of each:

Site:
Trainers:

INSTALLER INTERVIEW SCHEDULE

Name _____ Site _____
Regular Job Title _____ Date _____
Interviewer _____

1. Background: Briefly describe the significant events which led up to your decision to install PETC-II.

2. Objectives: What were your objectives for setting up PETC-II here?

2. Costs: To the best of your knowledge, what were the costs of installing this workshop and how are these costs being financed?

Probe:

How financed? Please check appropriate column, or write in "Other"

Direct Costs

LAB

TRAINEES

INST

- a. facilities (meals?) \$ _____
- b. handbooks _____
- c. supplies (paper, etc.) _____
- d. Trainer fee _____
- e. Installer fee _____
- f. _____
- g. _____

Indirect Costs (Person hours)

- a. Installer _____
- b. Secretarial _____
- c. _____
- d. _____

Do you feel these costs are reasonable considering the benefits of the workshop? Please explain.

3. Attracting Workshop Participants

Different people have various ways of setting up and organizing workshops.

- a. What strategies did you employ in recruiting workshop participants?

Probe for contacts made, institutions contacted

- b. What problems or difficulties did you encounter as you recruited these participants?

- c. Do you think the guidelines for obtaining participants (trainees) were feasible and adequate?

- d. Do you think pretraining materials provide trainees with adequate information about the system?

- e. Do they give people clear and appropriate expectations?

Probe for problems and recommendations

4. Attracting Client Systems

- a. What strategies do you employ in trying to attract prospective clients?
- b. What problems or difficulties did you encounter as you recruited these clients?
- c. Do you think the guidelines for obtaining practicum clients were feasible and adequate?
- d. Do you think pretraining materials provide the client groups with adequate information about their part in the workshop?

Probe for problems and recommendations

5. One possible side effect of the workshop is that the client groups will lose confidence in consulting help because of their experience with naive consultants. Have you noticed or do you anticipate any other unintended negative side effects of the workshop?

Trainer _____

TRAINER LOG

SESSION 1: INTRODUCTION

<u>Steps</u>	<u>Completed in Expected Time?</u>	<u>Process/Content Issues, Problems?</u>	<u>Changes?</u>	<u>Environment Problems?</u>
1. Introduction to the Session				
2. Find the Consultant Exercise				
3. Identify values				
4. Overview of PETC-II training				
5. Introduction to the matrices and models of PETC-II				
6. Work with PETC-II central ideas paper				

COMMENTS: (List additional comments on following page)

[This is a sample page from the Trainer Log. The complete log continues in the same format for all 10 sessions.]

PETC-II FOLLOW-UP INTERVIEW SCHEDULE

Name _____ Date _____ Workshop _____

Explain to the respondent that we would like follow-up information about participants' application of their PETC-II training since the workshop. The information is to be used for the sole purpose of evaluating the training and not their performance.

1. Have you done any process or organizational consulting since the PETC-II workshop? (Do not include their PETC-III client. Consultation consists in there being a clear understanding between the consultant and client that help in process or organizational areas is requested by the client and provided by the consultant. Complete a Consulting Log for each consultation.)

Number of consultations since PETC-II _____.

2. (For respondents who have not done consulting since their training in PETC-II beyond PETC-III) What are the major reasons or factors that account for not having done any consulting?

(Go on to check any of the following that apply.)

- ☐ a. I prefer not to do consulting.
- ☐ b. I didn't feel confident.
- ☐ c. My professional role did not include the possibility of consulting.
- ☐ d. Other priorities have left me with insufficient time.
- ☐ e. I have not been seen by prospective clients as a legitimate or viable consultant.
- ☐ f. No one has requested consulting help.
- ☐ g. Illness.
- ☐ h. I have no visibility as a consultant.
- ☐ i. Other:

PETC-II Follow-up Interview Schedule

3. Have you attempted to find your own clients or initiate consultations yourself?

____ a. Yes ____ b. No

4. Do you expect to do consulting in the future?

____ a. I have definite plans to do process consulting.

____ b. I hope to do consulting sometime in the future.

____ c. I don't expect to do much consulting.

5. What place does the PETC-II training hold in your future plans?
What factors would influence your plans?

6. Have you used the training in less formal ways than actual consulting?

If so, how?

(Go on to check any of the following that apply.)

____ a. Identifying for yourself or others areas of needed organizational change.

____ b. Helping a group develop a program or organization for meeting some goal, for example, a new curriculum or parent committee.

____ c. Organizing and planning your own efforts to help a group.

____ d. Helping your own group through a change process or to reach a goal.

____ e. Helping someone understand a potentially destructive experience in a group or organization as part of a counseling process.

PETC-II Follow-up Interview Schedule

____ f. Working on your own professional development.

7. Now that some time has passed since the workshop, how worthwhile has that experience been to you?

Not at all
worthwhile

1	2	3	4	5	6
---	---	---	---	---	---

Extremely
worthwhile

What major factors contribute to your evaluation?

8. Overall, how useful has the experience been to you in helping groups solve problems or achieve goals?

Of no use

1	2	3	4	5	6
---	---	---	---	---	---

Extremely
useful

9. Content and Strategies

- a. Did you feel the skills and knowledge that were taught in the PETC-II workshop were appropriate for learning to consult?

Ask the respondent to rate his/her response on the following scale:

Excellent Good Fair Poor

- b. Did you think the workshop format and learning activities were appropriate for learning to do consulting?

Ask the respondent to rate his/her answer on this scale:

Excellent Good Fair Poor

10. Costs

- a. Do you feel the outcomes of the workshop were worth the time you invested?

Rate respondent's answer on this scale:

Costs were small
for outcomes

Costs about
right

Costs too great
for outcomes

+

0

-

PETC-II Follow-up Interview Schedule

11. (Ask the respondent to complete the following questionnaire.)

Imagine an ideal, yet realistic, consulting experience. Then indicate how well you think you can accomplish the following consulting objectives compared to that realistic ideal.

	Excellent	Good	Satisfactory	Questionable	Unsatisfactory
1. Building a helping relationship of confidence and trust.	1	2	3	4	5
2. Helping to determine if change is needed and what should be changed.	1	2	3	4	5
3. Helping to build motivation to change.	1	2	3	4	5
4. Clarifying expectations about the consulting relationship, like duration of the relationship, restrictions, fees and expenses, client and consultant roles, etc.	1	2	3	4	5
5. Gathering data or information about the group's effectiveness.	1	2	3	4	5
6. Diagnosing the group's problems and difficulties.	1	2	3	4	5
7. Helping the group understand its problems and difficulties.	1	2	3	4	5
8. Helping the group to prioritize the major problems and issues and then decide on the problems to be solved.	1	2	3	4	5
9. Helping the group develop goals for change.	1	2	3	4	5
10. Helping the group identify alternative solution strategies.	1	2	3	4	5
11. Helping the group select an appropriate strategy.	1	2	3	4	5
12. Helping the group develop plans to implement your strategy.	1	2	3	4	5

PETC-II Follow-up Interview Schedule

		Excellent	Good	Satisfactory	Questionable	Unsatisfactory
		1	2	3	4	5
13.	Helping the group implement the change strategy.	1	2	3	4	5
14.	Helping the group generalize and stabilize the change.	1	2	3	4	5
15.	Helping the group evaluate the change and change effort.	1	2	3	4	5
16.	Effectively closing the consulting relationship.	1	2	3	4	5
17.	Understanding group processes and problems.	1	2	3	4	5
18.	Understanding your own ability to help a group.	1	2	3	4	5

CONSULTING LOG

Directions

In order that we may be able to judge the effectiveness of the PETC training system, we would like you to keep a log of any process or organizational consulting you do following the workshop. Our interest is in evaluating the system and not your performance. Thus, we would appreciate your candid responses. All information will be held strictly confidential.

Please complete a separate log for each client you work with. If you work with the same client more than once, complete a separate log for each consultation. We strongly urge you to complete the logs as early as possible following consultations. If you wait several days, you will probably find it much more difficult to recall your consultation activities.

We greatly appreciate your taking the time to keep these Consulting Logs for us. If you have difficulties or questions concerning this log or any other aspect of the PETC training and data collection, please feel free to call collect:

Gary Milczarek

Office: (503) 224-3650

Home: (503) 244-9992

Consulting Log

1. Consultant's name _____
2. What is the title or name of the client group? _____

3. Date of initial contact with client: _____
4. Date of final contact with client: _____
5. How many people are in the client group? _____
6. What is the purpose or function of the client group within the organization of which it is a part:

7. What is your organizational relation to the client?
The client is: (check one)

_____ a. Part of my own work unit
_____ b. Part of a different work unit in the same organization
_____ c. A member of a different organization: (What?) _____
_____ d. Other (What?) _____

If an organizational chart exists that shows your client's place in the organization, please enclose a copy. If a chart doesn't exist and it would be helpful to us in understanding your client, please provide a simple chart that shows your client's relation to the organization of which it is a part and your own place if you are a member of the organization.

8. Were you: (check one)

_____ a. Paid by the client group?
_____ b. Paid by your employer to help the client as part of your professional responsibility?
_____ c. Volunteering your time to the client?

9. How did the client learn about your consulting expertise? (check one)

_____ a. The client was referred to me by a third party

_____ b. I have an ongoing relationship with the client

_____ c. Other (What?) _____

10. The relationship was initiated by (check one)

_____ a. Me

_____ b. The client

Provide an overall summary of your consultation by completing the following outline:

The situation before your major interventions

Your goals for the client

Your assumptions

Your strategies/procedures

Planned

(Check all that apply)

Skills Training Exercise _____
 Training Workshop _____
Programmed Instruction _____
 Role Playing _____
Simulation and Gaming _____
 Confrontation _____
 Referral _____
 Demonstration _____
Process Observation _____
 Data Feedback _____
 Action Research _____
Improving Communications _____
 Logical Analysis _____
 Value Exploration _____
 Negotiation _____
 Problem Solving _____
 Plan Making _____
 Multiple Entry _____
Other (please describe below) _____

Actual

(Check all that apply)

Skills Training Exercise _____
 Training Workshop _____
Programmed Instruction _____
 Role Playing _____
Simulation and Gaming _____
 Confrontation _____
 Referral _____
 Demonstration _____
Process Observation _____
 Data Feedback _____
 Action Research _____
Improving Communications _____
 Logical Analysis _____
 Value Exploration _____
 Negotiation _____
 Problem Solving _____
 Plan Making _____
 Multiple Entry _____
Other (please describe below) _____

Outcomes for consultation

For example:

Client attendance at meetings increased from 65% to 95%; Planning Report was submitted on time; all members reported satisfaction with plan; members reported increased satisfaction with meetings, communication and planning procedures. Members reported continued dissatisfaction with trust, feelings, and resources.

Activities Record

Please fill out the Activities Record any time you engage in an activity related to your consulting experience. Thus you would make an Activities Record entry if you met with members of a client group, or met as a consulting team to discuss strategies, or individually spent time drafting consulting memos or reports. Your accumulated Activities Records should therefore, provide a summary of your total consulting activities. Please make your entries on the forms provided using the following categories:

Date: indicate the date the activity took place.

Time Spent: indicate in minutes the total amount of time spent on this activity.

Participants: indicate all persons who were involved in this activity. Be sure to indicate if only one consulting team member participated rather than the whole team.

Activity: indicate the nature of the activity, such as: phone call, group meeting, memo preparation, interview, consulting strategy session, etc.

Outcome: indicate the explicit outcomes accruing from the activity, if any. Also indicate your judgment of the utility of the activity.

Organization Process of Primary Interest: indicate the organizational process, if any, that this activity was designed to impact on. Although for example your overall consulting goal might be to help improve organizational planning, at various points you might be focusing on facilitating a particular decision making process or on improving an organizational communication process. Indicate the more specific foci under your overall consulting goal. Entries under this category should take into account OPERATIONAL CHARACTERISTICS and FUNCTIONS and might include organizational processes related to:

Decision making

Implementation and follow through

Planning

Progress monitoring

Problem assessment

Communication

Evaluation and feedback

Interpersonal relations

Information collection and use

Power and conflict

Alternative solutions generation

Others

A few sample Activities Record entries are given below:

Date	Time Spent	Participants	Activity	Outcome	Phase of Planned Change	Organizational Process of Primary Interest
11-15	45 min	Tom and 5 committee members	Tom called committee members to final meeting date & agenda	All members are interested and willing to help. Bill & Mary are not yet prepared for meeting. Prospects for meeting look good.	Phase 5 implementing change effort	Are trying to get committee members involved in explicit problem assessing activities.
11-19	60 min	Tom & John	Met to review meeting agenda & strategies	Agenda looks good but will need to be especially open to group needs, goals.	Phase 5 implementing change effort	Committee's problem assessment procedures.
11-23	180 min	Tom, John, 4 committee members (Bill unable to attend)	Discussed steps committee might take in assessing problems they have been assigned to work on (See agenda).	Early on, members became concerned over legitimization of committee's function. Unclear about committee's role. Group decided committee's role will continue to evolve.	Phase 5 implementing change effort	Committee's problem assessment procedures. Also, we are beginning to generate interest in organizations communication patterns necessary for committee to successfully carry out work.

ACTIVITIES RECORD

Date	Time Spent	Participants	Activity	Outcome	Phase of Planned Change	Organizational Process of Primary Interest

PRECONSULTATION CLIENT QUESTIONNAIRE

1. What is the name of your group?
2. What is your group's purpose?
3. Please describe your group's situation at this time. What are the problems and difficulties; what are you trying to do? Please be as specific as possible.
4. What are your goals for working with the consultant. Describe how the situation will be if the consulting is successful.

POSTCONSULTATION CLIENT QUESTIONNAIRE

2. Please describe what you now think was the situation of your group before the consultation. What were the problems and difficulties; what were you trying to do? Please be specific.

3. What is the situation of your group now, following the consultation?
What are the problems and difficulties; what are you trying to do?

4. Specifically, what do you think was accomplished as a result of the consultation?

5. Please indicate how much progress you think was made in the following areas during the consultation:

	Regression				
	No Progress				
	Little Progress				
	Some Progress				
	Great Progress				
	1	2	3	4	5
1. Understanding your group's problem or difficulty.	1	2	3	4	5
2. Understanding how to solve the problem or difficulty.	1	2	3	4	5
3. Becoming committed to solve the problem.	1	2	3	4	5
4. Solving the problem.	1	2	3	4	5
5. Becoming clearer about your group's goals.	1	2	3	4	5
6. Becoming more committed to the goals.	1	2	3	4	5
7. Developing more realistic goals.	1	2	3	4	5
8. Making progress toward the goals.	1	2	3	4	5
9. Increasing effectiveness of your group.	1	2	3	4	5

6. Imagine an ideal, yet realistic, consulting experience. Then indicate how well you think your consultant accomplished the following consulting objectives compared to that realistic ideal. This item is repeated in case two consultants worked with you. If you had more than two consultants, complete the ratings for only two of them.

Consultant's name _____

	Excellent	Good	Satisfactory	Questionable	Unsatisfactory
	1	2	3	4	5
1. Building a helping relationship of confidence and trust with your group.	1	2	3	4	5
2. Helping you determine if change is needed and what you want changed.	1	2	3	4	5
3. Helping you to build motivation to change.	1	2	3	4	5
4. Clarifying expectations about the consulting relationship, like duration of the relationship, restrictions, fees and expenses, client and consultant roles, etc.	1	2	3	4	5
5. Gathering data or information about your group's effectiveness.	1	2	3	4	5
6. Diagnosing your group's problems and difficulties.	1	2	3	4	5
7. Helping you understand the problems and difficulties of your group.	1	2	3	4	5
8. Helping you to prioritize the major problems and issues and then decide on the problems to be solved.	1	2	3	4	5
9. Helping you develop goals for change.	1	2	3	4	5
10. Helping you identify alternative solution strategies.	1	2	3	4	5
11. Helping you select an appropriate strategy.	1	2	3	4	5

	Excellent	Good	Satisfactory	Questionable	Unsatisfactory
12. Helping you develop plans to implement your strategy.	1	2	3	4	5
13. Helping you implement the change strategy.	1	2	3	4	5
14. Helping you generalize and stabilize the change.	1	2	3	4	5
15. Helping you evaluate the change and change effort.	1	2	3	4	5
16. Effectively closing the consulting relationship.	1	2	3	4	5
17. Understanding group processes and problems.	1	2	3	4	5
18. Understanding their own ability to help you.	1	2	3	4	5

EXPERT REVIEW GUIDELINES

The purpose of this review is to obtain expert opinion of the merit of the PETC series of instructional systems. This information will be presented as part of a technical report to the National Institute of Education.

After reviewing all three systems, please write a critique that addresses each of the questions outlined below. The critique need not be limited to these items but clear judgment of merit, positive or negative, are needed for each question.

1. What is your expert opinion concerning the merit of the rationale and goals of the PETC series. Consider:
 - a. clarity
 - b. logic (conceptual integrity)
 - c. social significance
 - d. whether important claims and disclaimers have been made explicit

Do you have any recommendations?

2. Have the target populations been clearly identified?
3. What is your expert opinion concerning the merit of the content of the instructional system? Content refers to the skills, concepts, principles, values and issues that are the subject of the system.

Please respond generally considering the content as a whole and noting exceptions when appropriate.

Please consider the following criteria:

- a. conceptual adequacy
- b. theoretical significance
- c. practical significance for successful consulting
- d. empirical justification for consulting practices recommended
- e. clarity of definition and presentation
- f. appropriate emphasis of content elements
- g. adequate integration of content elements
- h. parsimony
- i. sufficiency

Any recommendations?

4. In general, are the PETC-II training procedures appropriate for the system's purposes, content and intended population?

Any recommendations?

5. Is the role of the trainer clear and appropriate for such an instructional program?

Any recommendations?

6. Discuss any positive or negative side effects you might expect from the system.

7. Discuss any additional strengths or weaknesses of the system in terms of your own criteria.

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program with which you are familiar. The client system is interested only in programs providing them with OD and training resources. Which system would you use for the comparison?

Title _____

Author _____

Publisher _____

Why did you choose this system?

2. Please list the strengths and weaknesses of each system below in terms of the categories given.
Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST				
WORKSHOP FORMAT (including ease of implementation)				
MATERIAL CONTENT				
PROBABLE SHORT-TERM EFFECTS				
PROBABLE LONG-TERM EFFECTS				
USEFULNESS TO CLIENTS				

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC			OTHER SYSTEM		
<u>COST</u> ☐ Reasonable ☐ Somewhat Reasonable ☐ Prohibitively Expensive			<u>COST</u> ☐ Reasonable ☐ Somewhat Reasonable ☐ Prohibitively Expensive		
<u>WORKSHOP FORMAT</u> ☐ Well-organized ☐ Parts were Organized ☐ Poorly Organized			<u>WORKSHOP FORMAT</u> ☐ Well-organized ☐ Parts were Organized ☐ Poorly Organized		
<u>MATERIAL CONTENT</u> ☐ Comprehensive ☐ Adequate ☐ Superficial			<u>MATERIAL CONTENT</u> ☐ Comprehensive ☐ Adequate ☐ Superficial		
<u>USEFULNESS TO CLIENTS</u> ☐ Useful ☐ Somewhat Useful ☐ Not Useful			<u>USEFULNESS TO CLIENTS</u> ☐ Useful ☐ Somewhat Useful ☐ Not Useful		

Which would you recommend your client system select?

___ PETC

___ Other System

ALTERNATIVES SEARCH QUESTIONNAIRE

Dear (Sir):

The Improving Teaching Competencies Program, directed by Chic Jung at the Northwest Regional Educational Laboratory, is developing a series of training materials to enhance the learning environment in schools and in the classroom. One of the products being developed is Preparing Educational Training Consultants (PETC), a three-part training program in process consultation and organizational development skills. Enclosed is a capsule description of the components of the PETC series for your information.

As a part of the evaluation of the PETC series, we are conducting a search for products that are alternatives to PETC. Preliminary steps in the search have identified you [you and your organization] as having done work in the area of process consultation and organized change. We would like information about any products and training systems you have developed or are in the process of developing in these skill areas, and any workshops or training programs you present which are not available in a packaged form.

It is our intention to send copies of the completed study to persons and organizations who have contributed to its contents. We are not aware of any existing detailed, descriptive catalogue of process consultation training packages and programs, and we feel that this study can be a valuable resource for people working in this field. We are asking you then, to be as complete as possible in the information you provide us. Specifically, we are requesting information on costs to participants, time involved, participant prerequisites, theoretical background, strategies use, expected outcomes, and results from any evaluation studies which have been done on the training system. We have enclosed a form and prepaid envelope for your convenience. Whatever information you can provide us will be appreciated.

Regards,

David A. Green
Research Assistant
Improving Teaching Competencies Program
NWREL

Enclosures: 2

PETC-I: Skills Trainers Workshop is for diagnosis of *individual and group needs of educators in the area of process skills such as goals setting, communicating, influencing or decision making*. The PETC Skills Trainer has competencies in selecting, adaptively designing, conducting and assessing results of skills training exercises for such needs. His training prepares him to conduct Group Process Skills (GPS) workshops. It does not prepare him to offer other kinds of consultation or training services to a client system.

PETC-II: Consulting is for applying differential diagnostic techniques and differential intervention strategies in *helping a client system move through phases of an improvement effort*. The PETC-II Consultant forms a temporary relationship with the client system to add, or strengthen, a function needed to realize a value or attain a goal. The PETC Consultant is also involved in continuously rediagnosing his own competencies and deriving his explicit rationale for assuming the consultant role.

PETC-III: Organizational Development trains the consultant to apply further diagnostic and intervention techniques. Their goal is to facilitate normative and/or structural changes which *add and maintain improved functional capability of the organization*. Whereas the PETC-II Consultant temporarily supports needed functions, the PETC-III Organizational Developer helps to build them into the system permanently when appropriate and feasible. In addition, PETC-III consultants apply techniques which increase those functional capacities of the organization to add new kinds of objectives and utilize new kinds of resources.

QUESTIONNAIRE

Name of training package or program:

How is it made available to the public?

Number of participants (minimum-maximum):

Participant prerequisites:

Cost of the workshop for participants:

Time investment involved:

What is the theoretical basis for the workshop's content and strategies?

Describe the workshop strategies:

What are the expected outcomes (claims, disclaimers)?

If an evaluation study has been made on the training package, would you please send a summary of the results.

If there is a brochure for the training system, would you please enclose a copy.

For further information, whom should we contact?

Thank you.

David A. Green
Research Assistant
Improving Teaching Competencies Program
NWREL

SURVEY OF POTENTIAL USERS

Northwest
Regional
Educational
Laboratory



710 S.W. Second Avenue • Portland, Oregon 97204 • Telephone (503) 248-6800

September 30, 1975

The Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory is developing and evaluating a three-part instructional system called *Preparing Educational Training Consultants* (PETC). The major purpose of PETC is to train a limited number of educators to work effectively as group process and organizational development consultants to school districts, task forces, committees, boards and faculties, and to train other educators within their districts in group process consultation.

The system has undergone several years of development and field trials with educators who have helped us refine it and determine its effectiveness. Now we are seeking the opinions of people, like yourself, who are in positions concerned with staff development and inservice training. We need your help in further assessing the applicability and feasibility of the program we are developing.

We hope you will give us about ten minutes of your time to read the following description of PETC and to fill out the questionnaire. Your responses will be valuable information to us in determining the potential need and usefulness of this program as we move into the dissemination stage of our work.

Sincerely,

Charles C. Jung, Director
Improving Teaching Competencies Program

Enclosures

CCJ:jeh

Preparing Educational Training Consultants (PETC)

PETC is a series of three self-contained instructional systems. Individuals participating in this sequence of workshops learn ways of improving the organizational effectiveness of educational groups. Participants gain skills in working with faculty groups, committees or entire school districts at three levels of expertise. These three levels are referred to as (1) skills trainers, (2) consultants and (3) organizational development specialists.

Skills Training (PETC-I)

PETC-I prepares participants to use training exercises in group process skills. Some of these process skills are related to communication techniques, problem solving, decision making and goal identification.

The ten-day workshop is conducted in two parts. The first part consists of potential skills trainers being trained in the group process skills exercises that they will eventually use themselves as trainers. In the second part, the potential skills trainers practice using the PETC-I training materials for others unacquainted with the system.

Objectives. The two part sequence is designed to train participants to:

1. Help individuals assess problems and issues in groups of which they are members
2. Diagnose skill needs of individuals and groups
3. Select, adapt and sequence available skill training exercises
4. Conduct skill training exercises
5. Help individuals identify skills learned and relate them to groups of which they are members

*Costs. The package of materials for a participant costs approximately \$40. Additional costs of the workshop (excluding meals, travel and lodging expenses, if any) may run about \$150 per participant (including trainer fees, facility use, refreshments, etc.).

Consulting (PETC-II)

PETC-II prepares individuals to work with educational groups as consultants. Participants learn to diagnose an organizations's problems and provide assistance that will temporarily add or strengthen such functions as managing, planning and producing which allow the group to more adequately accomplish

its immediate goals. A PETC-II workshop is divided into three parts, the first consisting of three consecutive ten-hour days of instruction in basic concepts of consulting. Part two is a three-day practicum in which participants engage in consulting projects with client groups prearranged by the workshop trainers. Part three concludes the training with three days of debriefing, evaluation of the consulting practicum, and integrating learnings of the workshop.

Objectives. The workshop has been designed to:

1. Develop participants' consulting skills
 - building helping relationships with client groups
 - diagnosing client needs and problems
 - developing and implementing plans for helping clients solve their problems
2. Develop participants' understanding of key concepts in the consulting process
 - planned change
 - symptoms and causes of poor group functioning
 - procedures for helping groups become more effective
3. Develop participants' appreciation for crucial consulting issues
4. Develop participants' awareness of their own values and motives for being consultants

*Costs. Participant materials for this workshop cost about \$15. Additional costs for a workshop including trainer fees, facilities and refreshments may cost about \$150 per participant.

Organizational Development (PETC-III)

PETC-III provides participants with an opportunity to acquire skills and knowledge in a strategy for organizational change. Organizational development is a set of practices that have evolved in industrial, government and (more recently) educational settings for the purpose of improving organizational health and effectiveness.

PETC-III training is spread over a time period of six to eight months. During that time the trainee completes a one-day preworkshop assignment, attends 17 days of workshop sessions and spends a minimum of 10 days conducting an organizational development project with a pre-determined client organization. The project is a series of interventions based on diagnostic data which aim at structural and normative changes to improve the functioning of the organization.

Objectives. PETC-III prepares individuals to do the following:

1. Involve the organization in the diagnosis of change needs and in the identification of a change effort
2. Use concepts in PETC-III to make statements about the organization's health and maturity
3. Develop plans to bring about an increased functional capacity of the organization
4. Decide on appropriate interventions and manage the change efforts
5. Assume a variety of consulting roles to facilitate movement toward improvement
6. Help the organization to stay focused on normative and structural change
7. Either bring about an end to the consulting relationship or to involve the organization in the identification of next steps for organizational development
8. Analyze his own values and ideological base for consulting, assess his professional growth needs, and establish professional growth goals

*Costs. Participants' materials for PETC-III are estimated to cost approximately \$50. Additional costs for a workshop may run about \$600 per participant for trainer fees, facilities and refreshments.

*Cost estimates assume that the workshops are held in educational institutions which absorb some of the costs for facilities and possible trainers.

PETC QUESTIONNAIRE

The Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory is interested in the opinions of people, like yourself, about an instructional system called *Preparing Educational Training Consultants*. We hope you will take 5-10 minutes and fill out the following questionnaire and return it in the enclosed envelope. Most questions require only a check mark or a ranking. Of course, any further comments you wish to make will be appreciated.

Your Role Title _____ Check One: _____ State Department _____ School District

Approximate School District Size _____ Total Years Experience in Education _____

_____ Male _____ Female

1. Have you attended workshops similar to PETC as described in the previous pages? _____ Yes _____ No

If Yes, please list the approximate title and length and cost of the workshops.

OFFICE
USE

_____ 1 _____ 2

_____ 3 _____ 4

_____ 5

_____ 6

_____ 7

Many school districts, state departments and other educational agencies have individuals responsible for staff development. The following list includes some typical functions performed by staff development personnel.

2A. Please indicate the importance your program currently places on each staff development function listed below. Please use the following scale:

- 1-very important
- 2-important
- 3-neither important nor unimportant
- 4-unimportant
- 5-very unimportant

- _____ Providing inservice workshops on subject matter content
- _____ Providing inservice workshops on child development or child psychology
- _____ Providing inservice workshops on classroom group processes
- _____ Providing consultative help to individuals such as teachers, building administrators or central office personnel
- _____ Providing consultative help to small committees or task forces in the district or state
- _____ Providing a plan for community involvement in schools
- _____ Developing and implementing an integrated long term plan for staff development
- _____ Conducting training for interpersonal sensitivity, communication skills or personal growth
- _____ Conducting training in group processes for school faculties or work groups in the district or state
- _____ Developing a group of skilled individuals within the district or state who train and consult with others
- _____ Other, please specify _____

2B. Again, using the same list, please indicate how important you believe each function is for staff development. Please use the following scale:

- 1-very important
- 2-important
- 3-neither important nor unimportant
- 4-unimportant
- 5-very unimportant

- _____ Providing inservice workshops on subject matter content
- _____ Providing inservice workshops on child development or child psychology
- _____ Providing inservice workshops on classroom group processes
- _____ Providing consultative help to individuals such as teachers, building administrators or central office personnel
- _____ Providing consultative help to small committees or task forces in the district or state
- _____ Providing a plan for community involvement in schools
- _____ Developing and implementing an integrated long term plan for staff development
- _____ Conducting training for interpersonal sensitivity, communication skills or personal growth
- _____ Conducting training in group processes for school faculties or work groups in the district or state
- _____ Developing a group of skilled individuals within the district or state who train and consult with others
- _____ Other, please specify _____

_____ 8 _____ 19

_____ 9 _____ 20

_____ 10 _____ 21

_____ 11 _____ 22

_____ 12 _____ 23

_____ 13 _____ 24

_____ 14 _____ 25

_____ 15 _____ 26

_____ 16 _____ 27

_____ 17 _____ 28

_____ 18 _____ 29

Continued on other side

- | | |
|--|---|
| <p>3A. Considering the importance <u>your program</u> places on functions of staff development, do you think the PETC instructional system would be useful for reaching your program's goals? (Check only one.)</p> <p>☐ Yes, definitely</p> <p>☐ Perhaps</p> <p>☐ Probably not</p> <p>☐ Definitely not</p> | <p>6A. Considering <u>your program's</u> goals for staff development, how much time could an individual or individuals <u>feasibly</u> have to participate in a program such as PETC? (Check only one.)</p> <p>☐ No time</p> <p>☐ A few days</p> <p>☐ A consecutive week</p> <p>☐ Two weeks spread out over 6 months</p> <p>☐ 15-30 days spread out over 1 year</p> <p>☐ 30-40 days spread out over 1 year</p> |
| <p>3B. Considering the importance <u>you</u> place on the functions of staff development, do you think the PETC instructional system would be useful for reaching your goals for staff development? (Check only one.)</p> <p>☐ Yes, definitely</p> <p>☐ Perhaps</p> <p>☐ Probably not</p> <p>☐ Definitely not</p> | <p>6B. Considering <u>your personal</u> goals for a staff development program, how much time would you consider desirable for an individual or individuals to participate in a program such as PETC? (Check only one.)</p> <p>☐ No time</p> <p>☐ A few days</p> <p>☐ A consecutive week</p> <p>☐ Two weeks spread out over 6 months</p> <p>☐ 15-30 days spread out over 1 year</p> <p>☐ 30-40 days spread out over 1 year</p> |
| <p>4. In your opinion, would your school district or state department be willing to pay the costs (time and money) to enable an individual or individuals to participate in a program of group process consultation, such as PETC? (Check only one.)</p> <p>☐ Yes, definitely</p> <p>☐ Perhaps</p> <p>☐ Probably not</p> <p>☐ Definitely not</p> | <p>7. Would you recommend a continuing workshop on group process consultation such as PETC for your staff development program?</p> <p>☐ Yes ☐ No (Check one.)</p> |
| <p>5. Do <u>you</u> believe there is a need in the educational community for educators with group process consulting abilities? (Check only one.)</p> <p>☐ Yes, definitely</p> <p>☐ Perhaps</p> <p>☐ Probably not</p> <p>☐ Definitely not</p> | <p>8. Would you be interested in attending a continuing workshop on group process consultation such as PETC?</p> <p>☐ Yes ☐ No (Check one.)</p> |
| | <p>9. Please write any additional comments or ideas you have.</p> |

For the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory, we thank you very much for your time and your thoughts. There is a self-addressed envelope to return this questionnaire. Again, thank you for your cooperation.

Appendix E:

INSTALLATION GUIDELINES AND
REGISTRATION MATERIALS

INSTRUCTIONS TO INSTALLER OF PETC II - CONSULTING

This document is written for the installers, the persons who set up the PETC II training, senior trainers, those who conduct the training and trainees of PETC II training. It includes information about qualifications of the trainees, the training design, criteria for client systems in the PETC II practicum, procedures to follow in securing client systems, and guidelines for setting up the training.

PETC II - Consulting is the second unit in the Preparing Educational Training Consultants of Program 100, Improving Teaching Competencies of NWREL. Potential participants have met prerequisites to this training. The prerequisites include completion of PETC I - Skills Training and participation in the following NWREL programs: RUPS, IPC and Interpersonal Influence. Attachment 1 is a statement of the purposes and objectives of PETC II.

PETC II Training Time Requirements

PETC II training requires 9 days and is in 3 parts. The 9 days can be successive or they can be arranged in 3-day segments, each segment separated by a week.

The first part is a 3-day schedule and includes morning, afternoon and evening meetings. A typical time schedule would be 9 a.m. to 12 noon, 1 p.m. to 5 p.m., and 7 p.m. to 9 p.m.

The schedule for the second 3 days depends on the availability of the client systems. Each team of consultants will work with their clients at the time designated by the client systems. Some client systems can only be available half days, either mornings or afternoons, others can only meet evenings. The consultants will schedule a minimum of 9 hours of consulting

with their clients systems and 12-15 hours for debriefing, critiquing and team planning during these 3 days. During this part the senior trainers will schedule meetings with the consulting teams for debriefing and training purposes.

The third part is also 3 days in length. The schedule will be from 8:30 a.m. to 12 noon, 1 p.m. to 5 p.m. and 7 p.m. to 9 p.m. the first day. The schedule for the last two days will be from 8:30 a.m. to 12 noon and 1 p.m. to 5 p.m.

Training Design

The training design for the first part of PETC II comprises theory presentation, practice through simulation, and making plans to meet with a client system.

Part 2 of PETC II provides the practicum for the instructional system. During this time teams of consultants will work with client systems to which they have been assigned. Guidelines for securing client systems for this part of the training are included in another part of this document.

In Part 3, the consultants will evaluate their consulting experience and participate in retrieval of resources for consulting.

PETC II Requirements

In order for PETC II to be implemented, certain requirements must be met:

1. Trainees must be aware of and agree to full-time participation in the entire design, including
 - a. Full-time attendance (see Time Requirements above)
 - b. Be a member of a team assigned to a client system
 - c. Be available during Part 2 for 9 hours consultation with client system and 12-15 hours of debriefing and planning sessions with team, whenever it is necessary for these meetings to occur and to meet with senior trainer for debriefing and planning.

2. Client systems must be secured by the installer six weeks prior to the start of the training sessions. (If the installer and the senior trainer are not the same person, the senior trainer must be fully briefed concerning the contents of this paper and the outcomes of the installing procedures.)

Great care needs to be taken so that client systems secured for the PETC II practicum know what is expected of them during the 3 days of the practicum.

1. Who Is The Client System

- a. The client system is a small task-oriented group which needs and is willing to accept short-term help in achieving an objective. The PETC II trainees will have 9 hours of time to offer.
- b. The small groups may be committees, task groups, etc. For example, a subject matter committee, a school curriculum committee, a special program task group, a planning group, a fact finding committee, an ad hoc faculty group, a department heads council.
- c. The client systems should be recruited from educational agencies (school building, district, state department, higher education) if at all possible.

2. What The Client System Can Expect

- a. A consultant team of two or three persons, who:
 - are experienced in education
 - have problem solving, communications and interpersonal influence skills
 - have complementary resources
 - have consulting skills
 - have commitment to be helpful
- b. The consultant team is able to be helpful with issues like the following:
 - group process skills such as improved communication, better decision making, goal setting, identifying and diagnosing problems
 - techniques for identifying, retrieving and utilizing resources
 - assessment and diagnosis of skill needs of the client system and training to increase those skills

- c. The client system can expect the consultant team to work with it for a total of 9 hours at times and in places the client and consultant work out together.
3. What Not To Expect of the Consultant Team

There are some things which are not appropriate expectations, given time constraints and the nature of the training.

 - a. Do not expect the consultants to solve the problems of the client system. They will involve the client in problem identification, clarification and analysis of possible solutions.
 - b. Do not expect the consultants to work on organizational issues. PETC II consultants will be prepared to deal with process issues of groups within the organization in the limited time of a temporary relationship.

Setting Up a PETC II Training

The installer of a PETC II training must do four things. They are--recruiting trainees, securing client systems, communicating with members of client systems, arranging for training facilities.

1. Recruiting trainees.

The participant population is determined by inviting those qualified (participation in RUPS, IPC, Interpersonal Influence and PETC I) and by requesting them to sign a registration form which contains all the information to which they must agree. (see attachment 2)

2. Procedures for securing client systems.

- a. Send a memo to potential client systems which explains the program and describes what is meant by client system and what can be expected.
- b. Arrange for a meeting with a representative of each potential client system. The meeting should, if at all possible, be with all potential client systems at once. The meeting should be conducted by the installer and senior trainer. During the meeting the following agenda should be considered.

- Brief statement about NWREL PETC program
- Statement of rationale for the practicum

- Discussion of PETC II requirements for client system, including what the client system can expect to happen, amount of time available, how contact with consultants is to be made
- Establishment of agreements includes:
 - Secure client system(s)
 - Provide name and phone number of a contact person in client system to be interviewed by phone during the consultant team's planning time (the day before the practicum starts)
 - Set time and place for the consultation (this could, if necessary, be arranged in the phone conversation with the contact person)
 - Provide evaluation and feedback data about consulting experience.

3. A message to client systems.

It is extremely important that the members of the client system be given the opportunity to get information about the arrival of the PETC II consultant team, what they can expect and not expect, etc.

Once the client systems have been established and agreement reached through a person representing the client systems or through a person speaking on behalf of the client systems, a message should be prepared and sent to each person in each of the client systems recruited.

Use the following outline to prepare the message:

1. The team of consultants coming to spend time with you during 3 days (indicate days and hour agreed upon) are completing training provided by the Northwest Regional Educational Laboratory of Portland, Oregon in the Preparing Education Training Consultants, PETC, Program.
2. You can expect the team of consultants to have resources which they are committed to use in helpful ways. For example, they:
 - are experienced in education
 - have problem solving, communication and interpersonal influence skills
 - have complementary resources
 - have consulting skills

3. You can expect the consultant team to be able to help with issues like the following:

- group process skills such as improved communication, better decision making, goal setting, identifying and diagnosing problems
- techniques for identifying, retrieving and utilizing resources
- assessment and diagnosis of skill needs of the client system and training to increase those skills

4. You can expect the consultant team to work with you for a total of 9 hours maximum, at a time and place that you and the consultants work out together.

5. It is important that you do not expect the consultant team to solve your problem. They are willing to work with you on problem identification, clarification, analysis and resource utilization as feasible, also in identification of possible solutions.

6. Other

4. Provisions for training facilities

The list which follows is considered essential.

Rooms - a room large enough to accommodate 12 to 18 persons working in various small groupings for long period of time. It should be as comfortable as possible.

- small rooms for trios and/or teams which provide privacy and a low noise level. These rooms will be used for recording reports, for analysis of recorded reports of other teams, and for planning.

Furniture

- tables for book displays and materials
- moveable chalk board
- six to eight small tables (card tables)
- comfortable chairs

Materials and Supplies

- Senior Trainer Manual
- a set of participants materials for each trainee
- cassette tape recorder for each consulting team (3 persons)
- cassettes (3 for each team) C-60 minutes
- books and pamphlets listed in the PETC II Bibliography
- 1 1/2" notebook binders (or Acco fasteners)
- pencils
- newsprint
- masking tape
- felt tip pens
- boxes of No. 8 crayons
- cassette of music for final session

Refreshments

- coffee and tea (include sugar, creamer, spoons, etc.)
- snacks if possible and desirable

PETC-II Senior Trainer

The Senior trainer has fulfilled the following requirements:

1. Has completed PETC-I training and has conducted at least one PETC-I training event as co-trainer
2. Has received PETC-II training
3. Has co-trained in at least one PETC-II training event
4. Has received PETC-III training

OR

Has been accepted by application for the optional strategy for training of trainers which includes:

1. Attendance at a NWREL sponsored seminar for the PETC-II and PETC-III instructional systems
2. Has co-trained in at least one PETC-II training event

It is desirable to have two trainers for PETC-II training; a Senior trainer and a co-trainer. At this time it seems advantageous that two persons conduct the PETC-II training to provide complimentary resources and support for each other. Another reason for having two trainers is to increase the number of qualified persons available to conduct PETC-II training.

Names of persons qualified to conduct PETC-II training can be secured from Dr. William T. Ward, NWREL.

PREPARING EDUCATIONAL TRAINING CONSULTANTS - PETC II - CONSULTING

Registration For PETC-II Training

Name _____ Telephone _____
AC/Number _____
Street Address _____ School or Agency _____
City _____ State _____ Zip Code _____

Please read carefully what follows. Your signature at the bottom of the next page will indicate that you understand and agree to this information. If it is not possible to make the necessary arrangements please do not register for this PETC II workshop.

Participation as a trainee in PETC II requires agreement to the following:

1. Attending full-time

1. Workshop dates _____
2. Workshop location _____
3. Workshop costs _____
4. Workshop schedule _____

Part I - 3 days

9:00 a.m. to 12:00 noon
1:00 p.m. to 5:00 p.m. each day
7:00 p.m. to 9:00 p.m.

Part II - 3 days

3 hours with client system each day
4 hours debriefing and planning in team each day
Consultation with trainer by appointment at least once.

Part III - 3 days

One day 8:30 - 12:00 a.m.
1:00 - 5:00 p.m.
7:00 - 9:00 p.m.

Two days 8:30 - 12:00 a.m.
1:00 - 5:00 p.m.

2. Participating in the total training design

Part I - Theory presentation, skill practice, become member of consulting team, participate in making plans to meet a client system.

Part II - Participate fully in the practicum for working with a client system, consulting with senior trainer, debriefing and planning with team.

Part III - Evaluation of practicum, integrating learnings.

3. Arranging your schedule so that you will have no plans to engage in activities other than the training during the workshop.

I believe I understand what is expected of me for this PETC II workshop and agree to the above requirements.

Signature